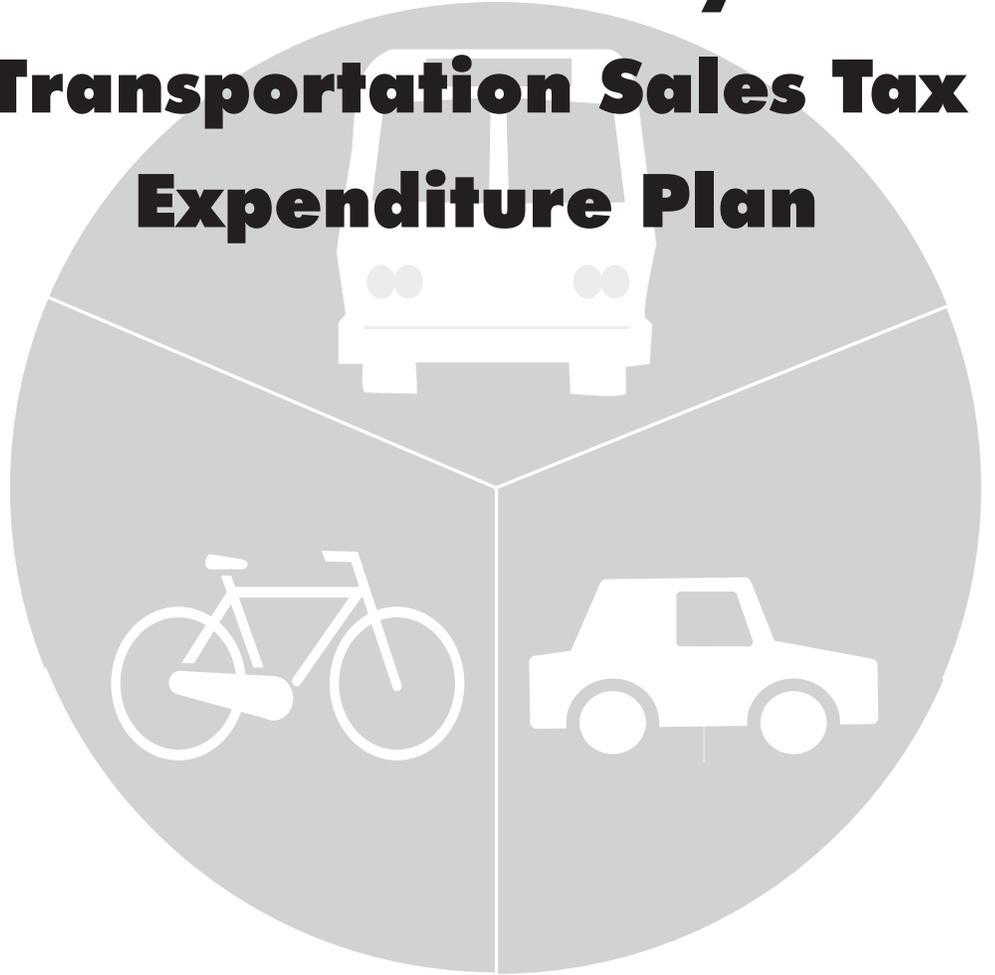


Marin County Transportation Sales Tax Expenditure Plan



**Approved Final Plan
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Executive Summary

WHY DOES MARIN COUNTY NEED A TRANSPORTATION SALES TAX?

Our transportation system is in crisis. The days of being able to build more or wider roads to deal with increasing mobility needs are over. To maintain mobility, we must provide a balanced transportation system that includes all modes – roadways and transitways, bikeways and pedestrian facilities – and includes services that are targeted to the diverse communities within Marin County. Despite our increasing needs, funding continues to shrink, resulting in delays to our most important projects and reducing our alternatives.

Even projects that we once thought had sufficient funding are now in jeopardy as a result of our current statewide fiscal crisis. The Highway 101 Carpool Lane Gap Closure Project ("gap closure")*, which would complete the "gap" in the high occupancy vehicle lane on Highway 101 through San Rafael, has lost some of its promised funding as a result of the State's financial problems. Without a new source of local funds, this critical transportation project will suffer long delays, and may not be completed for another decade. Additionally, funding for local bus transit service continues to be insufficient to meet even the reduced service levels implemented in November 2003. Local funds are needed to end the spiral of "service cuts and fare increases" that will otherwise continue to decimate our local transit network, just as commute patterns change to favor more in-county commutes.

One of the few avenues for funding that can be directly implemented by Marin County residents is a transportation sales tax. This transportation sales tax Expenditure Plan* outlines a program for spending a half-cent (½-cent) increase in sales taxes, which can only be spent on transportation purposes in Marin County. This plan is intended

Marin County's transportation problems have gotten worse just as transportation funding has become more scarce. A transportation sales tax is the most feasible method available to fund the projects that will meet Marin's most pressing problems:

- **Reducing congestion on Highway 101**
- **Maintaining and improving our local roads and other infrastructure**
- **Maintaining and improving bus transit services both within Marin County and to San Francisco**
- **Maintaining and improving specialized paratransit services for seniors and the disabled**
- **Reducing local congestion around schools and providing safe routes to schools**

* See glossary for definition of term.

to provide a high degree of accountability, while maintaining the flexibility needed to respond to emerging transportation issues over a 20-year period. The program focuses on meeting local needs with locally generated funds, allowing state and federal sources to be focused on regional needs.

By generating local funds specifically targeted for local transportation improvements, the Transportation Sales Tax Expenditure Plan will enable Marin to:

- **Compete successfully for State and Federal grants requiring local matching funds, allowing local tax dollars to fund more projects**
- **Fund the projects with the greatest local impact based on measurable performance criteria**
- **Ensure that funds are distributed fairly throughout the County**

These funds can not be taken by the state or any other agency or used for any other purpose than those stated in the Plan.

Becoming a “Self-Help” County* will help Marin get its fair share of state and federal sources.

While a sales tax alone will not solve all of our transportation problems, implementing a transportation sales tax, approved by two-thirds of the voters of Marin County, opens new opportunities for leveraging* or matching our local money with state and federal sources that require a local share. Using leveraging, our local sales tax has the potential of generating more funding from outside sources than the amount generated locally, while setting Marin County on a course of independence that will allow us to determine our own priorities for transportation projects.

HOW WILL THE SALES TAX EXPENDITURE PLAN HELP IMPROVE MOBILITY WITHIN MARIN COUNTY?

The plan has a single goal, supported by four implementation strategies, designed to protect the environment and quality of life enjoyed in Marin County. Each strategy is supported by specific but flexible programs (described in detail in the body of the plan) that have been designed to provide a high degree of accountability to voters.

WHAT IS NOT INCLUDED IN THIS PLAN?

No single source of funding can implement all of the transportation projects planned for Marin County. Expenditures to create or operate regional rail programs and the Highway 101 Marin-Sonoma Narrows Project are specifically not included in the sales tax expenditure plan. In addition, to minimize local funding of regional projects, the only project on Highway 101 eligible for sales tax funding is the Highway 101 Carpool Lane "Gap Closure" described in Strategy 2.

* See glossary for definition of term.

Figure ES-1 – Sales Tax Expenditure Plan Summary

GOAL: Improve mobility and reduce local congestion for everyone who lives or works in Marin County by providing a variety of high quality transportation options designed to meet local needs.		
Implementation Strategy	%	Est. 20-year Revenue (\$Millions)
1. Develop a seamless local bus transit system that improves mobility and serves community needs, including special transit for seniors and the disabled (paratransit services).	55%	\$182.38
2. Fully fund and ensure the accelerated completion of the Highway 101 Carpool Lane Gap Closure Project through San Rafael.	7.5%	\$24.87
3. Maintain, improve, and manage Marin County’s local transportation infrastructure, including roads, bikeways, sidewalks, and pathways.	26.5%	\$87.87
4. Reduce school related congestion and provide safer access to schools.	11%	\$36.48
TOTAL	100%	\$331.6 M

Figure ES-1 articulates the goal of the sales tax and summarizes each of the implementation strategies.

The plan’s implementing strategies provide improvements to all travel modes, providing a richness of choices for those that drive and for those that cannot (or choose not to) drive for all of their trips. By increasing both the variety and quality of travel options available to Marin County residents and workers, the plan’s implementing strategies provide a clear path to improving future mobility.

The plan has been designed to balance flexibility with accountability. Under no circumstance can the proceeds of this sales tax be used for anything other than the specific transportation projects described in this Expenditure Plan.

These strategies are designed to maximize the efficiency of our transportation investment in three key ways:

- **Coordinated Funding** – The projects and programs within each of the strategies are designed to complement and reinforce one another by providing necessary infrastructure and capital investments, supportive programs, or both. All strategies work toward supporting the single goal of the Expenditure Plan.
- **Independence** – By developing its own source of local transportation funding, Marin County can plan its transportation future independent of other agencies that may not have the best interests of Marin County at heart.
- **Matching or Leverage** – By becoming a “self-help county”^{*} Marin can gain access to external funds and grants. The projects and programs outlined in this plan are expected to bring an increased share of funding from other sources.

PLAN DEVELOPMENT AND IMPLEMENTATION

This plan represents the culmination of over four years of planning, preparation, and public involvement. The plan has been heavily influenced by the input of five Citizens Advisory Committees, representing the diverse interests of the County, and by the input of all of the cities and towns in the County.

If passed, the duration of the tax will be 20 years, ending in 2025.

If passed, this Transportation Sales Tax Expenditure Plan will be managed by the Transportation Authority of Marin (TAM)^{*}, an agency created to plan, finance, and oversee implementation of transportation programs. The Authority^{*} includes representatives from each of the cities and towns in Marin County, as well as all five members of the County Board of Supervisors, who work together to improve mobility in the County. Public input will be guaranteed throughout the implementation process with a Technical Advisory Committee^{*} made up of many of the public stakeholders in the County assisting in project prioritization. A Citizens' Oversight Committee^{*} will report directly to the public and will be made up of private citizens representing a diverse range of interests within the community. All decision processes will encourage broad public input.

^{*} See glossary for definition of term.

Marin County Transportation Sales Tax Expenditure Plan

BACKGROUND

Today, more than 80% of all daily trips originating in Marin County are made in autos on roads built to standards established decades ago. Our transportation infrastructure is being overburdened as our demand to travel continually increases. This comes as no surprise to the people who live and work in Marin County. In a recent poll, transportation issues, including reducing congestion on Highway 101 and maintaining and improving our local transportation systems, were identified as the most important issues facing Marin County today.

There is no single solution to our transportation problems, just as there is no single source that can fully fund all of our mobility needs. Transportation projects in Marin County are funded in a variety of ways, including grants from federal and state government, local shares of gas tax and sales tax, and other means. However, current funding will not be adequate to maintain the existing transportation system over the coming 20 years, and will not keep pace with the demands of an increasingly mobile Marin County. In fact, Marin County's 2003 Transportation Vision identified nearly \$2 billion in transportation projects in Marin County that should be completed over the next 25 years, with only about \$300 million in known revenue available for these projects.

Even projects that we once thought had sufficient funding are now in jeopardy as a result of our current statewide fiscal crisis, including completion of the Highway 101 Carpool Lane Gap Closure Project through San Rafael. Without a new source of local funds, this critical transportation project will not be completed until at least 2015. Additionally, funding for local transit service continues to be insufficient to meet even the reduced service levels implemented in November 2003. A new source of local funds is needed to end the spiral of service cuts and fare increases that will otherwise continue to decimate our local transit network, just as commute patterns change to favor more in-county commutes.

Transportation sales tax funds can be directly controlled by Marin County and can only be used on the local transportation projects specified in this Plan.

Recognizing that the future of our county depends on the mobility provided by a safe and comprehensive transportation network that includes many different travel options, Marin County and its partners are continually advocating for new funding sources for transportation. One of the few avenues for funding that can be directly controlled by Marin County residents is a transportation sales tax. While the sales tax will not close the funding gap, it provides a significant opportunity to improve our transportation system.

This Transportation Sales Tax Expenditure Plan outlines a program for spending a half-cent (1/2-cent) increase in sales taxes, to be entirely dedicated to transportation purposes in Marin County. This plan is intended to provide a high degree of accountability, while maintaining the flexibility needed to respond to emerging transportation issues over a 20-year period. The program focuses on meeting local needs with locally generated funds, allowing state and federal sources to be focused on regional needs. As with other sales taxes, rent, grocery purchases, healthcare, water, and utilities would be exempted from the new tax, minimizing the impact on lower-income households. Furthermore, this Expenditure Plan has been designed to provide significant benefits to lower-income households by funding bus transit and other improvements that benefit those who do not own or choose not to drive cars.

A half-cent (1/2-cent) transportation sales tax is expected to generate an average of \$16.5 M per year over 20 years in new revenue, net of expenses for administration, debt service and bond issuance costs,¹ or a total of \$331.6 M (million) over 20 years. This source alone will not solve all of our transportation problems. But, implementing a transportation sales tax, approved by two-thirds of the voters of Marin County, demonstrates to regional, State, and Federal funding agencies that Marin County is a “self-help county,” willing to contribute to its own transportation future. It opens new opportunities to compete for state and federal grants that require a local match. Using this approach, our local sales

¹ Gross sales tax revenue is estimated to be \$19.6 M annually. The Plan assumes a \$30 M bond issue in the first year of the sales tax, resulting in approximately \$2.65 M in annual debt service, and an annual 5% administration cost.

tax has the potential for generating more funding from outside sources than the amount generated locally, while setting Marin County on a course of independence that will allow us to set our own priorities for transportation projects.

The Transportation Sales Tax Expenditure Plan in Summary

The goal and strategies presented in this Transportation Sales Tax Expenditure Plan represent the culmination of over four years of planning and extensive input from the public and from the cities and towns throughout the County. The plan was developed with the assistance of five Citizens' Advisory Committees, representing diverse interests, including representatives of environmental groups, social justice organizations, business representatives, advocates for every travel mode, and advocates for underserved populations, including seniors, persons with disabilities, and those with limited incomes. The plan represents the collective wisdom of those groups, as well as the best technical information available today. The plan was further shaped by input from the cities and towns in Marin County, who each had an opportunity to review and comment on the draft plan as it was being completed.

The Transportation Sales Tax Expenditure Plan has a single goal:

Improve mobility and reduce local congestion for everyone who lives or works in Marin County by providing a variety of high quality transportation options designed to meet local needs.

The plan recognizes that there is no single mode of travel that can fulfill all of our transportation needs. Rather, it takes the best advantage of different modes to create a multi-modal transportation system that will improve mobility for auto drivers, transit riders, and those that walk or bike throughout all of Marin County.

PLAN COMPONENTS

The plan is organized around four strategies designed to protect the environment and quality of life enjoyed in Marin County. Each strategy is supported by specific but flexible programs (described in subsequent sections of the plan) that have been designed to provide a high degree of accountability to voters. Recognizing that the revenue generated by a sales tax is variable and dependent on the health of the economy, each program has been allocated a percentage of receipts. An estimated dollar amount over the 20-year life of the tax is also provided. As receipts increase or decrease, the amounts allocated to each program may fluctuate, but the overall percentage will be maintained.

The strategies outlined in Figure I will help achieve the goal of the Expenditure Plan by providing congestion relief and enhancing mobility, bringing improvements to all travel modes and providing a richness of choices for those that drive and for those who cannot (or choose not to) drive for all of their trips. The specific investment choices made in each implementation strategy will be based on measurable benchmarks and performance criteria, ensuring that the proceeds of the tax are used efficiently and effectively.

Figure 1 Transportation Sales Tax Expenditure Plan – Implementation Strategies

GOAL: Improve mobility and reduce local congestion for everyone who lives or works in Marin County by providing a variety of high quality transportation options designed to meet local needs		
Implementation Strategy	%	Est. 20-year revenue (\$Millions)
<p>1. Develop a seamless local bus transit system that improves mobility and serves community needs, including special transit for seniors and the disabled (para-transit services).</p> <ul style="list-style-type: none"> • Maintain and improve existing levels of bus transit service throughout Marin County • Improve the frequency of buses in high volume corridors • Implement small bus and community-based shuttles in many neighborhoods • Implement school bus service enhancements • Maintain and expand the rural bus transit system • Improve bus services between Marin County and San Francisco • Maintain and expand transit services and programs for those with special needs – seniors, persons with disabilities, youth, and low-income residents • Invest in bus transit facilities for a clean and attractive transit system • Provide matching funds for bus transit improvements 	55.0%	\$182.38 M
<p>2. Fully fund and ensure the accelerated completion of the Highway 101 Carpool Lane Gap Closure Project through San Rafael.</p>	7.5%	\$24.87 M
<p>3. Maintain, improve, and manage Marin County’s local transportation infrastructure, including roads, bike-ways, sidewalks, and pathways.</p> <ul style="list-style-type: none"> • Maintain, improve, and manage our <u>major</u> roadways, bikeways, sidewalks, and pathways • Maintain, improve, and manage our <u>local</u> roadways, bikeways, sidewalks, and pathways 	26.5%	\$87.87 M
<p>4. Reduce school related congestion and provide safer access to schools.</p> <ul style="list-style-type: none"> • Maintain and expand the Safe Routes to Schools Program • Provide crossing guards at key intersections • Provide capital funding for Safe Pathways to School projects 	11.0%	\$36.48 M
TOTAL	100%	\$331.6 M

Marin County 20-Year Transportation Sales Tax Expenditure Plan Details

STRATEGY 1- DEVELOP A SEAMLESS LOCAL BUS TRANSIT SYSTEM THAT IMPROVES MOBILITY AND SERVES COMMUNITY NEEDS, INCLUDING SPECIAL TRANSIT FOR SENIORS AND THE DISABLED (PARATRANSIT SERVICES).

Bus Transit investments will be evaluated every two years through a transit planning process that includes extensive public input from all areas of the county. Transit investments will be prioritized based on an analysis of the following measurable performance criteria:

- **Fills a gap in the bus transit network**
- **Meets productivity standards** based on passengers per hour
- **Meets cost effectiveness standards** based on subsidy per trip
- **Relieves congestion** as measured in total ridership
- **Provides seamless connections** to regional service
- **Eliminates “pass ups”** or overcrowding on existing routes
- **Promotes environmental justice** based on demographic analysis
- **Attracts outside funding sources**, including federal, state and toll revenue as well as other local funds

It is no longer possible to meet our mobility needs solely by building new or wider roads. Looking to the future, one thing is clear – to manage congestion we will have to provide a range of choices that will enable people to travel differently, creating a sustainable transportation system that promotes mobility and maintains the quality of life we enjoy in Marin County.

This strategy is supported by a variety of bus transit programs that are designed to work together with the other strategies in the plan to develop a sustainable and responsive alternative to driving for many trips in Marin County. It is intended to provide Marin County with an efficient transit system that meets the needs of those who travel both between and within communities via bus or shuttle transit. Increasing mobility is not intended to replace auto travel, but rather to provide an option for those who either cannot or choose not to drive for all of their trips.

By providing a dedicated source of local funds for public bus transit, Marin County’s Transit District (MCTD)* will be able to plan and implement services that are tailored to the needs of local residents. Providing local funding will also increase our opportunities to match or leverage State and Federal funding sources to further enhance our local transit service. Working with the public at all levels, as well as Marin County’s cities and towns, the Transit District* will be able to design services that take advantage of smaller, cleaner vehicles that are matched to the demand in our neighborhoods. In order to respond to changes in demand for bus transit services over the 20-year life of the Expenditure Plan, the Transit District will provide an updated Short Range Transit Plan* to the Authority every two years, with significant opportunity for public input both at

* See glossary for definition of term.

Strategy #1	%	Est. 20-year revenue (\$Millions)
Develop a seamless local bus transit system that improves mobility and serves community needs, including special transit for seniors and the disabled (paratransit services).	55%	\$182.38 M
<i>What can local bus transit funds be used for?</i>		
1. Maintain and expand local bus transit service <ul style="list-style-type: none"> • Maintain and expand existing levels of bus transit service throughout Marin County • Improve frequency of bus service in high volume corridors • Improve bus service between Marin County and San Francisco • Provide new small bus service and community-based shuttles in many neighborhoods • Restore night service as demand requires • Provide school bus service enhancements 	37.0%	\$122.69 M
2. Maintain and expand the rural bus transit system <ul style="list-style-type: none"> • Expand Stage Coach service to and from West Marin 	3%	\$9.95 M
3. Maintain and expand transit services and programs for those with special needs – seniors, persons with disabilities, youth, and low-income residents <ul style="list-style-type: none"> • Maintain and expand services for seniors and persons with disabilities currently provided by Whistlestop Wheels • Provide supplemental taxi services • Expand group transportation and shuttle services focused on seniors • Provide fare discounts for very low-income residents, including youth, seniors, and persons with disabilities 	9%	\$29.84 M
4. Invest in bus transit facilities for a clean and efficient transit system <ul style="list-style-type: none"> • Build bus transit hubs in Novato and Southern Marin • Purchase clean fuel vehicles • Improve bus transit stop amenities (e.g., bike racks, shelters, benches, etc.) 	6%	\$19.90 M
TOTAL	55%	\$182.38 M

the countywide and local levels. This plan will measure the effectiveness of bus transit investments as well as planning for the future. Updated performance data will be provided to the Authority annually.

The transportation sales tax provides a unique opportunity for Marin County to plan and implement transit services focused on Marin County needs.

MAINTAIN AND EXPAND LOCAL BUS TRANSIT SERVICE

Without a dedicated local funding source, local bus transit service cuts are likely to continue. In the past, Marin County has been able to count on the toll revenue generated by the Golden Gate Bridge, Highway and Transportation District* to help fund its bus transit needs. The growing needs for bus transit service both in the Highway 101 corridor and between communities within Marin County, coupled with increasing expenditures on the bridge itself, have made everyone who lives and works in Marin County vulnerable to service cuts and fare increases that are largely outside of our control.

This program will provide the funding necessary for Marin County to protect its local bus transit service and ensure that service levels are not only maintained, but also significantly enhanced in the longer term. This program provides the County with the necessary financial independence to ensure that local bus transit service supports countywide goals for enhanced mobility and meets the needs of its residents and workers both now and in the future.

In order to maximize the effectiveness of Marin County's transit dollars, the Marin County Transit District (MCTD) will develop a Short Range Transit Plan, with updates every two years. The planning process will provide many opportunities for public input from all areas of the county, enabling Marin County to strategically target transit investments over the 20-year life of the Expenditure Plan. All transit investments will be evaluated based on an analysis of a consistent set of performance-based criteria (listed in the sidebar on page 6), which will ensure that funds are spent where they will provide the greatest benefit. The final local transit implementation plan will be approved by the Transit District in a public hearing prior to sending the plan to the Authority,* which will also approve the plan in a public forum.

* See glossary for definition of term.

Priority Projects

The Marin County Transit District has developed a number of priority investments for local transit improvements that may be funded by this sales tax. They include improvements in nearly every neighborhood in Marin County.

These candidate projects would have a high priority for service improvements over the life of the Plan:

Provide transit service every 15 minutes in the following corridors:

- Highway 101 corridor connecting all communities in the corridor and San Francisco
- San Rafael to College of Marin via Andersen Drive/Sir Francis Drake
- San Rafael to San Anselmo via Red Hill/4th Street
- San Rafael Transit Center to Civic Center and Northgate Mall

Provide transit service at least every 30 minutes in the following corridors:

- Sausalito to Marin City and the Toll Plaza via Bridgeway
- Mill Valley on Miller Avenue and East Blithedale
- Corte Madera and Larkspur via Tamalpais/Magnolia and Sir Francis Drake
- San Anselmo to Fairfax via Sir Francis Drake and Red Hill Road
- San Rafael via Lincoln to Civic Center, Merrydale and on to Kaiser Hospital
- Novato service in the Hamilton area, in the Ignacio area east of Palmer and South Novato Boulevard.
- Novato service from neighborhoods to Vintage Oaks Shopping Center
- Corridor service from Novato to San Rafael transit center with connections to College of Marin.

Provide accessible neighborhood scaled shuttles using small buses in the following communities

- Novato, building on the EZ Rider Shuttle and serving the proposed transit hub
- Mill Valley, implementing the “Millie” shuttle designed locally
- Sausalito, building on the “Sally” shuttle developed by the City of Sausalito
- Belvedere and Tiburon, providing ferry connector and flexible service to lower density hilly areas

- San Rafael, connecting local employment centers with downtown and the transit center
- Ross Valley, connecting the local communities in the valley
- Maintain and expand the West Marin Stagecoach
- Restore night service as demand requires
- Restore ferry connector shuttles to communities with high demand
- Flexible services for hillier or less populated areas with transit demand

Provide enhanced school bus service using creative school transportation solutions

- Expand traditional yellow school buses for younger children
- Develop multi-purpose shuttles that serve schools as well as other needs
- Improve public transit service to schools, and after school programs

Improved Frequency in High Volume Corridors

This program will provide funding to maintain and improve intercommunity bus transit service and service along major bus transit corridors. Marin County has a number of bus transit corridors that are busy enough to justify frequent service. These include all day services in the Canal – downtown San Rafael – Marin City corridor, services between San Rafael and San Anselmo, and services to local colleges, as well as peak period services to major employers in Novato, San Rafael, and other locations. These services require larger buses to address capacity constraints and are designed to operate at high frequency to meet existing and latent demand.

Bus services between Marin County and San Francisco on the Highway 101 corridor provide both local and regional mobility to Marin County residents and employees. These services may also be funded under this category, provided that the Golden Gate Bridge, Highway and Transportation District maintains the toll revenue that currently funds these regional services. The intent of this "maintenance of effort" provision is to ensure that the value of toll subsidies to regional routes is preserved and that sales tax funds are not used to replace toll revenues allocated to support the regional network. The specific language defining maintenance of effort will be included in the Short Range Transit Plan approved by the Marin County Transit District and the Transportation Authority of Marin. The maintenance of effort provision will be included in any funding agreement for these

Marin County Transit District will contract for local services in order to procure the highest quality and lowest cost transit system for Marin County residents. Decisions about priorities for transit system investments will be made locally by the Transit District and the Transportation Authority of Marin.

San Francisco oriented services between the Marin County Transit District and the Golden Gate Bridge Highway and Transportation District, subject to approval by both Boards of Directors. Any sales tax funds provided to the Golden Gate Bridge, Highway and Transportation District will be used only for specific transit purposes.

Small Bus and Community-Based Services in Many Neighborhoods

There are many transit markets in Marin County that are better served by small buses and community-based shuttles that address specific markets in less urban areas. Local services may be designed best on the community level, with implementation provided through the Marin County Transit District. The West County Stagecoach is an example of a system developed at the grassroots level that has exceeded all expectations. This success can be replicated in other Marin County communities. Each community will have the opportunity to work with the Transit District to define their greatest local transit needs and to identify potential solutions, such as shuttles and jitneys using small, efficient transit vehicles.

School Bus Service Enhancements

The need for enhanced school-oriented bus services in Marin County is very clear, as many schools are poorly served by transit routes that are not coordinated with arrival and dismissal times and that do not reach into the neighborhoods. The Short Range Transit Plan will take a creative approach to school bus service, investigating opportunities for targeted shuttles, yellow bus system enhancements, and other improvements that will work together with the other programs in this Expenditure Plan to create a new generation of transit riders.

MAINTAIN AND IMPROVE THE RURAL BUS TRANSIT SYSTEM

"The Stagecoach" service operating in West Marin has been an amazing success. What began as a one-year demonstration project has resulted in a sizeable grassroots following and higher-than-projected ridership. Although service is very limited, demand for this service continues to grow. Despite

the success of the Stagecoach, there is no funding available to continue services beyond the current year. This program would maintain the existing Stagecoach service and would focus on opportunities for expansion, including seven-day per week service and developing a north-south route.

MAINTAIN AND EXPAND TRANSIT SERVICES AND PROGRAMS FOR THOSE WITH SPECIAL NEEDS

Nearly everyone knows a senior or a person with a disability who needs help with his or her mobility. The availability of a high quality alternative to driving enhances safety on the roads, and enhances the quality of life of people who depend on these services.

The Marin County Transit District currently contracts with Whistlestop Wheels to provide specialized services for older adults and persons with disabilities. Demand for these services has continued to exceed the ability to increase service. Over the past five years, demand for paratransit has increased by 25%, far outpacing the availability of existing funds. Studies predict that over the next 20 years Marin will be the “oldest” county in the Bay Area, with more than 35% of its residents over age 65. Without the new funding that this tax provides, services to seniors and persons with disabilities will need to be reduced, making it more difficult for people to continue to live independently as they get older.

Services for seniors and persons with disabilities will be planned with the support of the existing consumer-based Paratransit Coordinating Council (PCC)*, which advises the Transit District on the needs of these communities and public input from all areas of the county. The Transit District will explore options for adding shuttles, scheduled group trips, and subsidized taxi service to the current mix of paratransit* options. In addition, the Transit District will work with the PCC and members of the senior and disability community to design fare programs that will ensure that no person is made homebound because they are unable to pay for transit services.

Priority Special Needs Transit projects include:

- **Maintaining and expanding transportation services for seniors and disabled**
- **Continue and extend paratransit services to all of Marin County**
- **Develop new shared ride, wheelchair accessible taxi service that augments paratransit services**
- **Expand group transportation and shuttle services focused on seniors**
- **Provide discounted fares for very low-income seniors and persons with disabilities, as well as the lowest income members of our community**
- **Provide discounted transit passes to youth**

* See glossary for definition of term.

Seniors and persons with disabilities are not the only groups with specialized needs. This program includes assistance for our youth and the lowest income families who are unable to afford current transit fares. This program will provide funds for discounted transit passes for youth, seniors, disabled, and low-income riders. The youth discounts will build on the success of the current "Ride and Roll" program and will work together with other school enhancements to develop early and life-long transit riding habits. Discounts to low-income riders will provide mobility and access to jobs and basic services to those with no alternative.

INVEST IN BUS TRANSIT FACILITIES FOR A CLEAN AND EFFICIENT TRANSIT SYSTEM

Innovative bus transit operation will require an investment in vehicles and facilities. This will include providing clean-fueled vehicles, new bus transit hubs in Novato and Southern Marin for efficient and safe transferring between routes, and amenities at bus stops, including enhancements of bus stop accessibility to pedestrians and cyclists and improved information for transit riders.

Bus transit facilities investments will be prioritized to coordinate with transit service projects based on the criteria outlined on page 6. High priority will be given to opportunities to match or leverage funds in order to help transportation sales tax dollars go farther.

Replacing older diesel buses with clean fuel technology, including electric hybrid or other alternative fuel buses, will improve the environment and attract new riders to transit.

Bus Transit Facilities priorities include:

- **Bus transit hubs in Novato and Southern Marin**
- **Clean fuel vehicles**
- **Bus transit stop amenities** (e.g., bike racks, shelters, benches, lighting, pay phones, access improvements)
- **Bike racks on buses**
- **Accurate signage and real-time information for riders**

STRATEGY 2 - FULLY FUND AND ENSURE THE ACCELERATED COMPLETION OF THE HIGHWAY 101 CARPOOL LANE GAP CLOSURE PROJECT THROUGH SAN RAFAEL.

The transportation sales tax allows us to complete the Gap Closure Project by 2008. This has been the highest priority project in Marin County for over a decade.

Highway 101 in Marin County is one of the busiest traffic corridors in the Bay Area. Spillover traffic from this congested freeway impacts our cities and our neighborhoods, whether or not we travel on the highway. Creation of a continuous carpool lane on Highway 101, for use by buses as well as carpools, will speed transit service making it more attractive to more users, while having a significant impact on congestion. For more than a decade, the Highway 101 Gap Closure project has been the top priority project in Marin County. Now, even with construction underway, the State's fiscal crisis threatens our ability to deliver the final phases of this essential project in a timely manner.

This project was to be funded entirely with State sources; however, the recent statewide financial crisis has left the project short of its remaining \$65.2 million funding need. By using sales tax revenue to complete this project, Marin County will be able to take advantage of nearly \$41 million of dedicated State funding. With these funds, the project will

* See glossary for definition of term.

Strategy #2 Fully fund and ensure the accelerated completion of the Highway 101 Carpool Lane Gap Closure Project through San Rafael.	%	Est. 20-year revenue <i>(\$Millions)</i>
<i>What can Gap Closure funds be used for?</i>	7.5%	\$24.87 M
<ul style="list-style-type: none"> • Completion of final construction segments through Central San Rafael and Puerto Suello Hill • Noise reduction strategies to improve quality of life in adjacent neighborhoods • Aesthetic and landscaping improvements • Completion of the north-south bicycle way through Puerto Suello Hill to improve bicycle safety 		

be completed by 2008. Without sales tax funds, the project is unlikely to be completed until 2015 and risks losing additional committed funds.

The project will provide a dedicated lane in both directions between Lucky Drive and North San Pedro Road, to be used by buses and carpools during peak hours. This project will fill in a critical “gap” in the continuous carpool lane that could speed carpools and buses throughout the County. The funding included in this project will make sure that this is the best project possible for all residents of Marin County by improving the aesthetics and landscaping and reducing the impacts of freeway noise on local neighborhoods with various noise reduction strategies, including the use of sound-absorptive materials on soundwalls. The project also includes completion of the north-south bicycle route through Puerto Suello Hill, ensuring that this important project is implemented along with freeway improvements.

If additional outside funding becomes available for this project in the future, sales tax revenues dedicated to this project would be redirected to transit projects outlined in Strategy I.

Funding for the Gap Closure project includes elements that will improve this project in the neighborhoods adjacent to it, including landscaping, noise reduction, and improvements to bicycle and pedestrian safety in the area.

STRATEGY 3 - MAINTAIN, IMPROVE, AND MANAGE MARIN COUNTY'S LOCAL TRANSPORTATION INFRASTRUCTURE, INCLUDING ROADWAYS, BIKEWAYS, SIDEWALKS, AND PATHWAYS.

**Potential roadway, bikeway,
sidewalk, and pathway
improvements may include:**

- **Pavement and drainage maintenance**, including signage and striping
- **Signalization and channelization** to improve traffic flow and safety at key intersections
- **Transit and traffic flow improvements** to eliminate conflicts between buses and cars
- **Transportation Systems Management and Demand Management projects** that make the most of our infrastructure investments
- **Improvements to reduce the response times for emergency vehicles** and improve safety
- **Bike path** construction and maintenance of bike paths
- **Sidewalk and crosswalk** construction and maintenance, and other pedestrian infrastructure improvements to safety and mobility
- **Accessibility** improvements to make our streets and roads usable by all

Every trip begins or ends on a local road. Pedestrians, bicyclists, bus passengers, and drivers of all types depend on a well-maintained and effective local roadway network that serves travel both within and between communities.

Local roads are the largest single public investment in the County. Without a well-designed and maintained roadway system, there are limited opportunities to provide adequate bus service or to connect bikeways and pedestrian pathways through the County. This program will help to reduce the maintenance shortfall on Marin County's roadways, improving safety and eliminating delays resulting from poor maintenance. The program is designed to improve the mobility of all local travelers, including those that drive and those that use other modes.

The need for funding projects on the roadway system is clear. A recent study completed by the Metropolitan Transportation Commission (MTC) projects that Marin County will have a shortfall of \$256 million over the next 25 years for maintenance of existing roadways, even with existing local funds from bonds and other measures included. MTC also concluded that Marin County's roads are among the worst in the region. Failing to maintain our roads now will be even more costly later, as roadway conditions deteriorate and negatively impact all transportation modes.

Projects included under this strategy are designed to minimize accidents, and improve operations and traffic flow for all people and transportation modes using the roadway or other infrastructure investment.

As projects are prioritized for funding, each project will be required to consider the needs of all roadway users. Project sponsors will be required to coordinate with adjacent jurisdictions to maximize economic efficiency and minimize

Strategy #3 Maintain, improve, and manage Marin County’s local transportation infrastructure, including roads, bikeways, sidewalks, and pathways.	%	Est. 20-year revenue <i>(\$Millions)</i>
	26.5%	\$87.87 M
<i>What can local infrastructure funds be used for?</i>		
<ul style="list-style-type: none"> • Road maintenance and congestion relief projects on major roads and on local roads • Safety improvements for all modes • All projects will consider all users, including transit riders, bicyclists, pedestrians, and auto drivers • Projects could include crosswalk and curb cut enhancements, bike lane and pathway construction, bus bulbs, intersection improvements, and pavement and drainage improvements, as well as system enhancements such as signal coordination, real time information, and other tools to maximize the efficiency of our transportation system 	26.5%	\$87.87 M
TOTAL	26.5%	\$87.87 M

construction impacts. The goal is to develop a comprehensive plan for improving critical roadways at the time an investment is made. Where feasible, locally defined bicycle and pedestrian projects will be implemented at the time a roadway is improved. Improvements could include striping and signing of bicycle lanes and bikeways, sidewalk improvements, curb ramps, and other accessibility and safety improvements.

Funds allocated to this strategy will be evenly divided between the major roads of Countywide significance that are used by most people in Marin County, and local priorities developed by each jurisdiction in the County. In all cases, roadway projects will consider all of the modes in the right-of-way, focusing on transit, bicycle and pedestrian safety, and access for the disabled.

Major Roads and Related Infrastructure

The following performance criteria will be used to prioritize major road projects:

- **Condition of roadway (Pavement Condition Index)**
- **Average daily traffic**
- **Transit frequency**
- **Bicycle and pedestrian activity**
- **School access**
- **Accident history**
- **Opportunities for matching funds**
- **Geographic equity**

Members of the Technical Advisory Committee, to be created by the Authority's governing board, will include representatives from and nominated by the following:

- **Marin Managers Association** (2 members)
- **Marin Public Works Association** (3 members)
- **Marin County Planning Directors Group** (1 member)
- **Golden Gate Bridge, Highway and Transportation District** (1 member)
- **Marin County Paratransit Coordinating Council** (1 member)
- **Marin County Transit District** (1 member)
- **Marin County Office of Education** (1 member)
- **Environmental Organizations of Marin County** (1 member)
- **Bicycle and Pedestrian Organizations** (1 member)
- **Business Organizations** (1 member)

Major roads often cross city limits and serve multiple communities. Projects on these roads must emphasize coordination between jurisdictions. Half of the funding allocated to this strategy (approximately \$43.9 M) will be spent on the most heavily travelled and significant roads and related infrastructure in Marin County. The remaining half will be spent on local roads and related infrastructure, based on priorities developed by each jurisdiction.

Priorities for major roadway and infrastructure projects will be determined by the Public Works Directors of each city, town, and the county working together with a Technical Advisory Committee* that is representative of the broad interests of Marin County. All investment decisions will be evaluated using measurable performance criteria, listed in the sidebar at the left side of this page. The process will provide opportunity for public input and will be approved by the Transportation Authority in a public meeting as part of the Strategic Plan.

To ensure that each community in Marin County receives an equitable share of sales tax funds, expenditures for major infrastructure projects will be distributed to the five planning areas of the County based on their population (50%) and road miles (50%). This distribution will be balanced every six years:

Figure 2 Funding Allocations for Major Infrastructure Projects

Planning Area	Current Distribution <i>Based on 50% Population & 50% Road Miles²</i>	Estimated 20-Year Revenue
Northern Marin	19.6%	\$8,611,260
Central Marin	25.4%	\$11,159,490
Southern Marin	21.7%	\$9,533,895
Ross Valley	20.2%	\$8,874,870
West Marin	<u>13.1%</u>	<u>\$5,755,485</u>
	100%	\$43,935,000

* See glossary for definition of term.

² Formula based on 2000 population and road miles data. Percentages will be reviewed at the start of tax collection and adjusted to reflect the most current information on that date.

The following roads of countywide significance are included as priority candidates for funding. These roads are used by nearly every Marin County resident. Additional roads may be considered if the needs of high priority roads within a planning area have been addressed.

- Atherton Avenue/San Marin Boulevard
- Novato Boulevard/South Novato Boulevard
- D Street/Wolfe Grade
- Las Gallinas Avenue/Los Ranchitos Road/Lincoln Avenue
- North San Pedro Avenue to the China Camp State Park Boundary or Sunny Oaks Drive
- Point San Pedro Avenue to the China Camp State Park Boundary or Biscayne Drive
- Red Hill Avenue/4th Street/2nd and 3rd Streets
- Andersen Drive
- Magnolia Avenue/Corte Madera Avenue/Camino Alto
- Redwood Avenue/Tamalpais Drive/Madera Boulevard/Tamal Vista Boulevard/Fifer Avenue/Lucky Drive/Doherty Drive
- Sir Francis Drake Boulevard from Interstate 580 to Platform Bridge
- Bridgeway Corridor (Bridgeway/Richardson Street/2nd Street/South Street/Alexander Avenue)
- Paradise Drive
- E. Blithedale Avenue
- Miller Avenue/Almonte Boulevard

Local Roads for All Modes

Local roads are the most basic unit of the transportation network because they connect our neighborhoods and business districts and provide linkages to major roads and transportation services. Local road priorities are determined by individual jurisdictions that can best evaluate local needs and their connectivity to the larger system.

Half of all funds allocated in this strategy (approximately \$43.9 M) will be distributed on an annual basis to each city,

town, and Marin County based on a combination of miles of roads to be maintained and population. As with the major road program, each project will be required to consider the needs of all roadway users. Where feasible, locally defined bicycle and pedestrian projects will be implemented at the time a roadway is improved. Improvements could include striping and signing for bicycle lanes and bikeways, sidewalk improvements, curb ramps, and other accessibility and safety improvements.

The following table shows the amount of funding that each jurisdiction can expect from this program, based on the current formula of 50% roadmiles/50% population. Local priorities would be determined by each jurisdiction's Public Works Director with approval of their governing board in a public meeting.

Figure 3 Funding Allocations for Local Infrastructure Projects by Community³

Agency	2004 % of Total	Estimated 20-Year Revenue Projection
Belvedere	1.04%	\$458,232
Corte Madera	3.20%	\$1,405,124
Fairfax	2.79%	\$1,225,121
Larkspur	4.16%	\$1,825,569
Mill Valley	5.99%	\$2,633,638
Novato	17.00%	\$7,466,928
Ross	0.99%	\$435,826
San Anselmo	4.70%	\$2,064,919
San Rafael	20.16%	\$8,855,643
Sausalito	2.84%	\$1,248,178
Tiburon	3.46%	\$1,521,530
County	33.67%	\$14,794,292
Total	100.00%	\$43,935,000

Sources: 2004 California Department of Finance Population Estimates, 2003-04 Marin County Road List, and 2004 road miles data from Marin City and Town Public Works Directors.

³ Percentages will be reviewed at the start of tax collection and adjusted to reflect the most current information on that date. Subsequently, percentages will be reviewed every two years as part of the Strategic Plan.

STRATEGY 4 – REDUCE SCHOOL RELATED CONGESTION AND PROVIDE SAFER ACCESS TO SCHOOLS.

In Marin County, school-related trips are a significant component of traffic congestion. In fact, over 21% of all trips in the morning peak period are school related. Congestion around schools is a serious and growing problem both for families with students and non-students alike. Everyone who travels in Marin County recognizes how much lighter traffic is on days when schools are off, even when it is not a common day off for workers.

A survey done by the Safe Routes to Schools program shows that without programs that target student and parent behavior and provide safe alternatives to driving, as many as 80% of students are driven in single student occupant autos to school. This creates severe local congestion at arrival and dismissal times, as well as deteriorating safety for those that walk and bike to school. In addition, many of Marin County's schools draw students from throughout the County and beyond, putting many school trips on Highway 101 and the major roads traveled for all trip purposes. There are currently over 75 elementary, middle, and high schools in Marin County, with a total of at least 40,000 students in grades K-12 – 50,000 including college students. Clearly, reducing single student occupant auto trips to schools will have the immediate benefit of reduced congestion, as well as long-term benefits to public health, the creation of lifelong sustainable habits, and increasing the opportunities for success of all alternative modes.

The programs in this strategy will be assessed every two years by the Technical Advisory Committee, through a public process involving parents, school officials, and students throughout the County. These countywide programs will be managed by the County of Marin. This investment of transportation sales tax funds will be combined with school bus projects already described in Strategy 1, to make a significant improvement in local congestion while encouraging safe and healthy behavior in our young people.

Strategy #4	%	Est. 20-year revenue <i>(\$Millions)</i>
Reduce school related congestion and provide safer access to schools.	11%	\$36.48 M
<i>What can school access funds be used for?</i>		
1. Safe Routes to Schools <ul style="list-style-type: none"> Ongoing funding to support this successful and popular program that promotes walking, biking, taking transit, or carpooling to school 	3.3%	\$10.94 M
2. Crossing Guards <ul style="list-style-type: none"> Crossing guards at 70 intersections along major roads serving schools 	4.2%	\$13.93 M
3. Provide capital funds for Safe Pathways To School projects <ul style="list-style-type: none"> Safety improvements around Marin County schools in conjunction with the Safe Routes to Schools Program, including sidewalk improvements, safer crosswalks and crossings, bicycle and pedestrian safety improvements, and speed reduction measures 	3.5%	\$11.61 M
TOTAL	11%	\$36.48 M

SAFE ROUTES TO SCHOOLS

Safe Routes to Schools is a proven program designed to reduce local congestion around schools while instilling healthy and sustainable habits in our young people. The program includes several components including classroom education, special events, and incentives for choosing alternative modes to schools, as well as technical assistance to identify and remove the barriers to walking, biking, carpooling, or taking transit to school. The program, which is currently managed by the County of Marin, is in its fourth year of operation and has proven its ability to increase alternative mode use to schools, reducing single student occupant auto trips to participating schools by at least 15%.

Current funding for Safe Routes to Schools does not extend beyond the 2004 school year. Without a new source of local funds, the Safe Routes program will terminate after the current school year. This strategy will maintain and expand the successful Safe Routes program to all schools within Marin County. The funding for other programs included under this strategy, Crossing Guards and Safe Pathways, will be closely coordinated with the activities of Safe Routes to Schools.

SCHOOL CROSSING GUARDS

One of the greatest barriers to using alternative modes to schools is the difficulty of crossing Marin's busiest streets. Even with pathway improvements, students' parents are reluctant to allow their children to walk or bike to school if they must cross a busy street. While some schools have attempted to implement volunteer crossing guard programs, experience has suggested that this is not a reasonable long-term strategy, as volunteers can not be counted on every day, in all types of weather, regardless of their personal schedules. Other Bay Area counties, such as Santa Clara and San Francisco, have realized that to eliminate liability concerns and to ensure that there are well trained crossing guards with back-ups for every critical intersection, they must contract with a professional company that specializes in crossing guard programs.

This program will use trained crossing guards for up to 70 intersections throughout Marin County. The intersections will be prioritized by the Public Works Directors together

The Safe Routes to Schools program combines classroom education, special community events, and coordination between school officials, parents and public works officials to create safe environments for walking, biking, and taking transit to school. At schools that participate in the program, single student vehicle traffic has been reduced by more than 15%.

This program would fund crossing guards for some of the County's most critical intersections, including the following potential locations:

- **Novato:** Diablo Blvd. and Center Rd. along Ignacio Blvd., in front of Sinaloa Middle School
- **San Rafael:** in front of Vallecito School and Bahia Way and Canal St. in front of Bahia Vista School
- **San Anselmo:** Butterfield Rd. and Sir Francis Drake
- **Fairfax:** at the pedestrian crossing in front of St. Rita's School
- **Southern Marin:** Camino Alto, East Blirhedale Ave., Miller Ave., Tiburon Blvd., and others
- **Ross Valley:** Numerous crossings of Sir Francis Drake, serving many schools

with the Technical Advisory Committee along with other school related projects, and approved by the Authority. At schools that have volunteer or other types of crossing guard programs, sales tax funds will augment the work that is already being done, making sure that these local funds are put to their best use. The process will provide opportunities for public input.

PROVIDE CAPITAL FUNDING FOR SAFE PATHWAYS TO SCHOOLS

Safe Pathways Projects will be selected based on performance criteria that focus on improving safety throughout the County. All projects will come from approved Safe Routes plans, supported by parents, school officials, and the local jurisdiction.

- **Relieves an identified safety or congestion problem along a major school route**
- **Completes a "gap" in the bicycle and pedestrian system along a major school route**
- **Maximizes daily uses by students and others**
- **Attracts matching funds**
- **Respects geographic equity**

Safe Pathways to School is the capital improvement element of the Safe Routes to Schools program. Where the Safe Routes program identifies circulation improvements needed for safe access to schools, the Safe Pathways program will provide funding for the engineering, environmental clearance, and construction of pathway and sidewalk improvements in all Marin County communities, including safety improvements at street crossings.

Although Safe Pathways projects target improvements around schools, they benefit the entire community, creating a safe network of bicycle and pedestrian facilities, enhancing safety and reducing local congestion.

Safe Pathway projects are expected to attract matching funds from other sources and may be used in combination with road funds to accelerate pathway improvements in school areas. Additional input will be solicited in a public forum that includes input from parents, school officials, and other community stakeholders. Specific projects will also be approved by the Transportation Authority of Marin in their Strategic Plan.*

* See glossary for definition of term.

Transportation Sales Tax Governance and Organizational Structure

TRANSPORTATION AUTHORITY OF MARIN (TAM)

This transportation sales tax is authorized under the Local Transportation Authority and Improvement Act, California Public Utilities Code Section 180000 et. seq. In approving this tax, the voters will authorize that the Transportation Authority of Marin (referred to as the Authority) be given the responsibility to collect and administer the tax proceeds. All monies raised by this sales tax will be available for expenditure only on the transportation projects identified in the Sales Tax Expenditure Plan. The make-up of the Authority's governing board is as follows:

- All five members of the Marin County Board of Supervisors, and
- One representative from each of the eleven incorporated cities and towns in Marin County.

All representatives to the Authority's governing board will be elected officials within Marin County. This composition provides a balance between the needs of the county as a whole and the priorities of individual cities, towns, and communities.

The Transportation Authority of Marin will be established for the purpose of authorizing and implementing this transportation sales tax. The Authority will incorporate the duties of the existing Congestion Management Agency, ensuring that all key transportation decisions are made in a single place. The duration of the tax will be 20 years from the initial year of collection, which will begin in April 2005. The tax will therefore terminate on March 31, 2025.

STAFFING AND ADMINISTRATION

The Transportation Authority of Marin will hire the staff and professional assistance required to administer the proceeds of this tax and carry out the mission outlined in the Expenditure Plan. The total cost for salaries and benefits for administrative employees will not exceed 1% of the revenues

generated by the transportation sales tax. Other administrative costs, such as rent, supplies, and fees paid to the State Board of Equalization for collecting the tax and financial, legal, or consulting services are not included in the 1% cap.

WORK PROGRAM AND STRATEGIC PLAN

All of the programs included in this Expenditure Plan are considered essential for the transportation needs of Marin County. The Authority will prepare an annual Work Program and Budget and a biennial Strategic Plan, which will identify the priorities for projects and the dates for project implementation based on project readiness, ability to generate matching or leveraged funds, and other relevant criteria. The Strategic Plan must be approved by a two-thirds vote of the total commissioners on the Authority Board, following a noticed public hearing on the draft Strategic Plan and a 45-day public comment period.

The allocation of funds described in this plan will be achieved over the life of the plan and may vary from year to year only as approved in the Strategic Plan and only in such a way that the distribution will not change over the life of the plan, unless the plan is specifically amended.

BONDING* AND FINANCING

The Transportation Authority of Marin will have the authority to bond and use other financing mechanisms for the purposes of expediting the delivery of transportation projects and programs and to provide economies of scale. Bonds, if issued, will be paid with the proceeds of the transportation sales tax. The costs and risks associated with bonding will be presented in the Authority's Strategic Plan, and will be subject to public comment before any bond sale is approved.

The Authority will also be able to use other means to accelerate the delivery of projects and programs, including seeking outside grants and matching or leveraging tax receipts to the maximum extent possible. The Authority will also have the ability to set aside a reserve fund of up to 10% of the

* See glossary for definition of term.

annual receipts from the tax for contingencies, to ensure that the projects included in this plan are implemented on schedule.

ACCOUNTABILITY

All business of the Authority will be conducted in an open and public meeting process. The Authority will approve all spending plans described in this document and will ensure that adequate public involvement has been included in the preparation of all spending plans. The Authority will be required to hire an independent auditor who will audit all sales tax expenditures, ensuring that expenditures are made in accordance with the plan.

The Authority will be guided by an Administrative Code covering all aspects of its operation.

Citizens' Oversight Committee

The Citizens' Oversight Committee will be created by the Authority's governing board with the assistance of the League of Women Voters. The unique feature of this Committee is that it will report directly to the public and will be charged with reviewing all expenditures of the Authority. The responsibilities of this Committee are:

- The Committee must hold public hearings and issue reports, on at least an annual basis, to inform Marin County residents how funds are being spent. The hearings will be open to the public and must be held in compliance with the Brown Act, California's open meeting law. Information announcing the hearings must be well-publicized and posted in advance.
- The Committee will have full access to the Authority's independent auditor and will have the authority to request and review specific information and to comment on the auditor's reports.
- The Committee must publish an annual report. Copies of these documents must be made widely available to the public at large.

Citizens' Oversight Committee members will be private citizens who are neither elected officials of any government nor public employees from any agency that either oversees or benefits from the proceeds of the transportation sales

This plan has been designed for the highest possible levels of accountability and public involvement in our transportation planning process.

tax. Membership will be restricted to individuals who live in Marin County. Members will be required to submit a statement of financial disclosure, and membership will be restricted to individuals without economic interest in any of the Authority's projects.

The Committee will be designed to reflect the diversity of the County. The committee will consist of 12 members. Each organization represented on the Citizens' Oversight Committee will nominate its representative, with final appointments approved by the governing board of the Authority. Membership will be as follows:

- One member will be selected from each of the planning areas in Marin County by the Authority Board members representing that area (Northern Marin, Central Marin, Ross Valley, Southern Marin, and West Marin). (Totaling 5 members)
- Seven members will be selected to reflect a balance of viewpoints across the County. These members will be nominated by their respective organizations and appointed by the Board of the Authority, as follows:
 - One representative from a taxpayer group
 - One representative from the environmental organizations of Marin County
 - One representative from a major Marin employer
 - One representative from the Marin County Paratransit Coordinating Council, representing seniors and persons with disabilities
 - One representative from the League of Women Voters
 - One representative from an advocacy group representing bicyclists and pedestrians
 - One representative from a school district, including parents

AMENDMENTS TO THE PLAN

The Authority's Board may annually review and propose amendments to the Expenditure Plan to provide for the use of additional Federal, State, and local funds, to account for unexpected revenues, or to take into consideration unforeseen circumstances. To modify this Plan, an amendment must be approved by a two-thirds majority of the total commissioners on the Authority Board, following a noticed public hearing and a 45-day public comment period. Following the

2/3 vote of the Authority, any plan amendment will be submitted to each of the cities and towns in Marin County and to the Board of Supervisors for their approval. Amending the Plan will require a majority vote of 50+% of the cities representing 50+% of the incorporated population, as well as a majority vote of the Board of Supervisors.

Implementing Guidelines

This plan is guided by principles that ensure that the revenue generated by the transportation sales tax is spent in the most efficient and effective manner possible, consistent with the desires of the voters of Marin County. The principles outlined in this section provide flexibility needed to address issues that may arise during the life of the plan. The specific operations of the Authority are further addressed in its Administrative Code.

1. The Transportation Authority of Marin is charged with a fiduciary duty in administering the transportation sales tax proceeds in accordance with the applicable laws and this Expenditure Plan. Receipt of these tax proceeds may be subject to appropriate terms and conditions as determined by the Authority in its reasonable discretion, including, but not limited to, the right to require recipients to execute funding agreements and the right to audit recipients' use of the tax proceeds.
2. All meetings of the Transportation Authority of Marin will be conducted in public according to state law, through publicly noticed meetings. The annual budget of the Authority, annual work plan, biennial Strategic Plan, and annual report will all be prepared for public scrutiny. The interests of the public will further be protected by the Citizens' Oversight Committee, described previously in this Plan.
3. Under no circumstances may the proceeds of this transportation sales tax be applied to any purpose other than for transportation improvements benefiting Marin County. The funds may not be used for any transportation projects or programs other than those

specified in this Plan without an amendment of the Expenditure Plan.

4. Revenue generated by this sales tax will not be used to create or operate regional rail programs or used for regional highway projects (Highway 101) with the exception of the Highway 101 Carpool Lane "Gap Closure" project described in Strategy 2.
5. Actual revenues may be higher or lower than expected in this Plan, due to changes in receipts and/or matching or leveraging capability. Estimates of actual revenue will be programmed annually by the Transportation Authority of Marin during its annual budget process. Because the Expenditure Plan is based on percentage distributions, dollar values in this Plan are estimates only. Actual revenues will be programmed over the life of the Plan based on the percentage distributions identified in the Plan.
6. The actual requirement for funds in a specific program could be higher or lower than expected due to changes in funding outside of this transportation sales tax, or due to changes in project costs or feasibility. Should the need for funds for any program within a strategy be less than the amount to be allocated by the sales tax, or should any project become infeasible for any reason, funds will first be reprogrammed to other programs or projects in the same strategy area with a two-thirds vote at a noticed public hearing. Should the need for funds in the entire strategy area be less than the amount to be allocated by the transportation sales tax, the Authority Board may amend the Expenditure Plan to reallocate funds to the other strategy areas following its procedures for a plan amendment.
7. If additional funding from other sources becomes available for the Highway 101 Carpool Lane Gap Closure Project (Strategy #2), or if the actual expenditures are less than allocated, then the equivalent amount of transportation sales tax receipts will be redirected to projects in Strategy #1.

8. All projects funded with these transportation sales tax funds will be required to complete appropriate California Environmental Quality Act (CEQA) and other environmental review as required.
9. Funds may be accumulated by the Authority or by recipient agencies over a period of time to pay for larger and long-term projects. All interest income generated by these proceeds will be used for the transportation purposes described in the Expenditure Plan.
10. The Transportation Authority of Marin will have the capability of loaning transportation sales tax receipts at prevailing interest rates to other agencies for the implementation of needed transportation projects, provided that there is a guaranteed revenue stream to repay such a loan and provided that the loan will not interfere with the implementation of programs or projects defined in the Expenditure Plan.
11. Matching or leveraging of outside funding sources is strongly encouraged. Any additional transportation sales tax revenues made available through their replacement by matching funds will be spent based on the principles outlined in 6 and 7 above.
12. New incorporated cities/towns or new bus transit agencies, that come into existence in Marin County during the life of the Expenditure Plan could be considered as eligible recipients of funds through a Plan Amendment.

Glossary

Term	Definition
Authority	Transportation Authority of Marin (TAM) – an agency created for the purpose of administering this sales tax, the Authority will be responsible for programming funding for all transportation programs in Marin County. The TAM Board will include representatives from each city and town in Marin County, plus the five members of the Board of Supervisors. The Authority will function as the Congestion Management Agency for Marin County.
Bonding	Selling municipal bonds will allow the Transportation Authority of Marin to accelerate capital projects by pledging future revenues for the repayment of bonds and getting needed capital funds “up front” for project implementation.
Citizens' Oversight Committee	A 12-member committee consisting of 5 representatives selected from the five planning areas and 7 representing diverse interest groups in Marin County. Reports directly to the public on all issues related to the Expenditure Plan and sales tax.
Expenditure Plan	The 20-year plan for spending sales tax funds.
“Gap Closure”	The Gap Closure Project includes the completion of the bus and carpool lane on Highway 101 through San Rafael. This project is designed to relieve a critical bottleneck on Highway 101.
Golden Gate Bridge Highway and Transportation District	The agency responsible for the Golden Gate Bridge, as well as regional transit including ferries and bus service between Sonoma, Marin, and San Francisco counties. Golden Gate currently operates local transit services in Marin County under contract to the Marin County Transit District.
HOV Lane	High Occupancy Vehicle or Carpool lane, open to vehicles with 2 or more occupants, including buses, during peak hours.
Leveraging or Leverage (also Matching)	Matching local sales tax dollars with other funds on a one-to-one or other percentage basis from local, regional, State, or Federal sources, to stretch local sales tax dollars by attracting new grant funding to Marin County.
Marin County Transit District (MCTD)	The existing local transit district, MCTD currently contracts for local transit services with Golden Gate Transit, which currently operates local services in Marin. MCTD also currently contracts for paratransit services with Whistlestop Wheels, as well as contracting for the West County Stagecoach. MCTD is governed by two city representatives and five representatives from the Board of Supervisors. Under the plan, MCTD will develop detailed transit plans with public input for approval by the Transportation Authority of Marin.

Term	Definition
Paratransit	Specialized transportation services for seniors and persons with disabilities who are unable to use regular bus routes.
Paratransit Coordinating Council (PCC)	The established group of seniors, people with disabilities, and their advocates who advise the Marin County Transit District on paratransit and accessibility needs.
Self-help County	A county with a local sales tax for transportation is called a “self-help” county, because the tax demonstrates that the County is willing to “help itself” to solve its own transportation problems. A self-help county has greater opportunities to compete for regional, State, and Federal grants by providing matching funds.
Short Range Transit Plan	A five-year plan required for every transit agency in the Bay Area, this document is the primary opportunity to identify transit needs and develop priorities.
Strategic Plan	A detailed plan of expenditures and revenue completed by the Transportation Authority of Marin every two years. The plan projects the use of sales tax funds, as well as other funding that may be available to projects in the plan. The Strategic Plan also considers the need for bonding or other financing techniques to accelerate projects.
Technical Advisory Committee	A committee made up of Public Works staff, other city staff and representatives of diverse public interests who will prioritize infrastructure improvements and make recommendations to the Transportation Authority of Marin.
Transportation Authority of Marin (TAM)	See "Authority."
Transit District	See "Marin County Transit District (MCTD)"