



**INVESTMENT  
PLAN FOR  
TRANSPORTATION  
SALES TAXES  
IN MONTEREY  
COUNTY**



# SUMMARY

## INVESTMENT PLAN HIGHLIGHTS

- 25 years; 1/2 percent sales tax,
- Raises nearly \$1 billion in sales tax revenues
- New local revenues will also help secure an estimated \$800 million in state and federal matching funds and regional developer fees (state, federal, existing fees—estimated \$400 million, and new regional development impact fees—estimated \$410 million)

### Safety and Congestion Relief Projects—50%

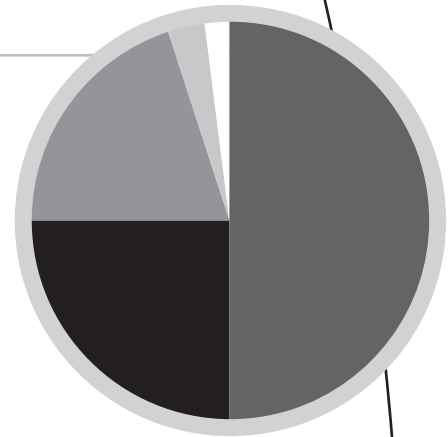
- Highway 1—Seaside/Sand City Widening
- Highway 68 Commuter Improvements
- Highway 68—Holman Highway Widening
- US 101—Harris Road Interchange
- US 101—San Juan Road Interchange
- US 101—South County Improvements
- Highway 156 Widening and US 101/156 Interchange Improvements
- Del Monte/Lighthouse Avenue Improvements
- Westside Salinas Connector
- Eastside Bypass Study

### Local Road and Street Maintenance—25%

- Flexible local funding with priority for local road maintenance
- Requires maintenance of prior years' funding levels from other sources

### Alternatives to Driving—25%

- Transit (20%)
  - a. Commuter bus service between Monterey and Salinas
  - b. Transit services for the elderly and persons with disabilities
  - c. 511 Traveler Information
  - d. New Transit Facilities
  - e. Rapid Bus Corridors ("bus rapid transit"):
    - Monterey Branch Line—Monterey to Marina
    - Lighthouse Avenue—Pacific Grove to Monterey
    - Fremont Avenue—Monterey to Seaside
    - 8th Street—Intergarrison Road—Marina toward Salinas
    - Westside Salinas Connector
    - East Salinas Corridor
- Regional Bicycle/Pedestrian Facilities (3%)
- Smart growth transportation incentives (1%)
- Habitat Conservation (1%)



## FUNDING ALLOCATION

- Safety & Congestion Relief (50%)
- Local Roads (25%)
- Transit (20%)
- Bicycle/Pedestrian (3%)
- Smart Growth & Habitat (2%)



## TAXPAYER SAFEGUARDS AND AUDITS

Strong taxpayer safeguards have been put in place to ensure that the projects and programs proposed in this balanced plan can be funded over its lifetime. They include:

- Guarantees that funding raised by the sales tax can only be used for the transportation projects and programs in this investment plan. The Transportation Agency for Monterey County will oversee the distribution of revenues to the projects and programs in this plan; monies cannot be taken and used for other purposes by another government agency;
- Appointment of an independent Citizens Oversight Committee to assure that revenues are spent according to the plan;
- Annual independent audits and reports to the taxpayers;
- Limits on the ability to change the programs or projects in the Plan;
- A 1% limit on funds used to pay for administrative salaries and benefits; and
- The ability to issue bonds to deliver projects ahead of schedule.

## HOW THE PLAN WAS DEVELOPED

Extensive public involvement guided development of the Investment Plan. The Transportation Agency for Monterey County held interactive meetings at which Monterey County community leaders and members of the general public gave their input on which features to include in the plan. Environmental groups, social justice organizations, agriculture and business leaders, trade unions, the taxpayers association, and transit advocates were intimately involved in Plan development. Every city in Monterey County and County representatives reviewed and made recommendations on the plan.

The Transportation Agency Board, representing the county and all cities, worked with experienced transportation planners and engineers to study this input and use their professional knowledge to create a plan that will improve safety and traffic congestion while enhancing the environment and supporting the regional economy.

# INVESTMENT PLAN OVERVIEW

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The goals of this investment plan are to make traveling safer, reduce traffic congestion, improve the condition of our local roads and provide meaningful alternatives to driving alone. The funding is divided into three basic programs to reach these goals:

- Safety and Congestion Relief—50%
- Local Road and Street Maintenance—25%
- Alternatives to Driving—25%

As funds are received, they will be set aside for these three separate accounts according to the percentages listed in this above, after deducting no more than 1% on funds used to pay for administrative salaries and benefits. All interest earned shall remain within its respective program category.

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The maps shown in this investment plan are representational; the exact project design will differ.



# SAFETY & CONGESTION RELIEF

## SALES TAX INVESTMENT PLAN SAFETY AND CONGESTION RELIEF PROJECT PRIORITIES

This program will receive 50% of the sales tax revenues.

These revenues, estimated at approximately \$490 million, will be matched with an estimated \$410 million in development fees and an estimated \$400 million in state and federal funding to pay for nine key safety and congestion relief projects. Most projects will be funded by a mix of funding sources. In addition to the nine projects that will be constructed, a study will also be conducted to determine the best route for the future eastside bypass of Salinas.

Projects will be designed to meet current standards, including bicycle and pedestrian access as needed. They will be thoroughly studied for environmental impacts and the identified environmental mitigations included in the project scopes.


### SAFETY AND CONGESTION RELIEF PROGRAM

**Priorities for Delivery:** It is the intent of this plan that safety and congestion relief projects be delivered in accordance with the three-tier priorities set forth in this plan. These delivery priorities are based on project readiness, availability of revenues

and geographic balance. Over the life of this Investment Plan, these factors and other assumptions may change. Modifying delivery priorities is allowed but shall require an amendment to this Investment Plan.

Safety & Congestion Relief Projects	Tier 1	Tier 2	Tier 3
Delivery Periods	2009-2016	2017-2024	2025-2033
Highway 68—Holman Highway Widening	●		
Highway 156 Widening & US 101/156 Interchange Improvements	●		
US 101 San Juan Road Interchange	●		
Westside Salinas Connector: Davis Rd.	●		
Eastside Bypass Study	●		
Del Monte Ave/Lighthouse Avenue Improvements		●	
Highway 1—Seaside/Sand City Widening		●	
Highway 68 Commuter Improvements		●	
US 101 South County Improvements		●	
Westside Salinas Connector: Reservation/Imjin		●	
Westside Salinas Connector: Westside—Boronda to Rossi		●	
US 101 Harris Road Interchange			●
Westside Salinas Connector: Westside—Rossi to Davis			●

**Notes:** Tier 1—Environmental review already underway. Tier 2—Conceptual Plan complete. Tier 3—No Conceptual Plan. Delivery = start construction.



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**Eligible Project Costs:** Eligible project costs include all conceptual studies, project development costs, right-of-way acquisition, construction costs and any other costs needed to deliver the projects, unless otherwise noted in the project description.

**Funding or Cost Changes:** Transportation planning experts, including independent financial and engineering professionals, have carefully crafted this Investment Plan with conservative revenue estimates and reasonable project cost contingencies. There are, however, many unforeseen circumstances that can arise over 25 years. The actual funding needs to construct the regional roadway projects may be higher or lower due to factors that are outside the control of this Investment Plan. Sales tax revenues or anticipated matching funds may also fall below or above projections. Should funding fall short, the Transportation Agency will prioritize the delivery of safety and congestion relief projects in accordance with the three-tier priorities in this plan. Should revenues for a given phase exceed projections, monies shall first be used to accelerate the delivery of projects in the next phase of the program. Should overall revenues exceed projections, funding shall first be dedicated to the final phase of the Westside Connector project, then to other safety and congestion relief projects as determined by the Transportation Agency.

**Removal or Addition of Projects:** Removal or addition of any project on the safety and congestion relief project list, for any reason, shall require an amendment to the Investment Plan.



# HIGHWAY 1—SEASIDE/SAND CITY WIDENING



## DESCRIPTION



Widen and upgrade Highway 1 from a four- to a six-lane freeway in the vicinity of Fremont Avenue in Sand City/Seaside to at least Canyon Del Rey in Seaside.

Includes interchange and related local road improvements in the vicinity of Canyon Del Rey and Fremont Avenues.

## PROJECT PURPOSE

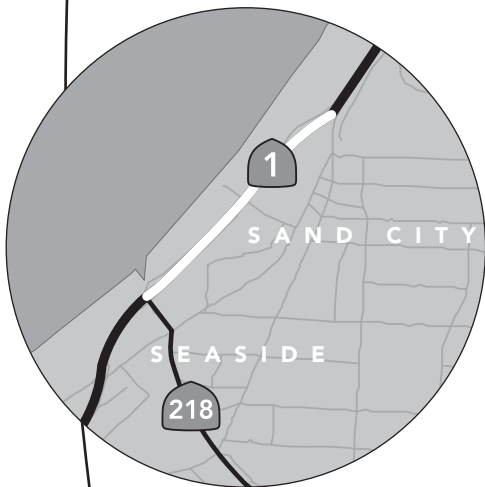
Highway 1 is the major north-south route connecting the Monterey Peninsula to communities north. Highway 1 currently experiences significant rush hour commute traffic. This project will relieve existing and future traffic congestion and improve safety and vehicular access to and from Highway 1 at Fremont Boulevard and at Canyon Del Rey Boulevard.

## PROJECT BENEFITS

- Improves safety
- Reduces traffic congestion
- Improves access to Highway 1
- Reduces commute times

## COST

The cost of the Highway 1 Widening Sand City/Seaside project is estimated at \$79 million. Fort Ord Reuse Authority fees will contribute to the funding of this project.



# HIGHWAY 68 COMMUTER IMPROVEMENTS

## DESCRIPTION



Make safety and operational improvements on Highway 68 between Salinas and the Monterey Peninsula, such as auxiliary lanes and intersection improvements to remove choke points. Evaluation of potential future capacity improvements is also eligible for funding.

## PROJECT PURPOSE

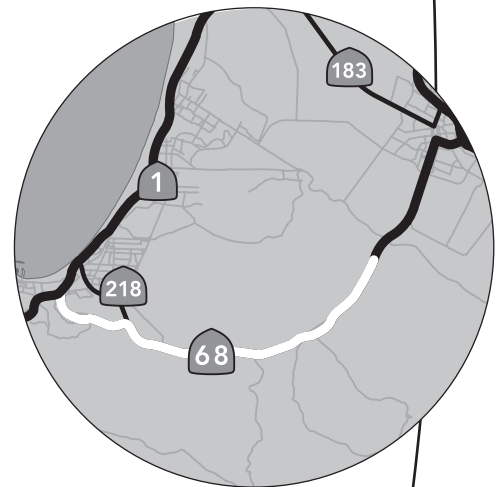
Highway 68 is the main connector between Monterey County's two principal urbanized areas, Salinas and the Monterey Peninsula, serving commuters and the residents, schools and business parks along the corridor. Traffic congestion along Highway 68 is currently at gridlock during the morning and afternoon commute periods. This project will provide relief to commuters in the Highway 68 corridor, in a manner that is cost-effective and environmentally sensitive.

## PROJECT BENEFITS

- Improves safety
- Reduces congestion and delays on Highway 68
- Supports regional travel between Monterey Peninsula and Salinas
- Improves access for local residents

## COST

The cost of the Highway 68 commuter improvements is estimated at \$40 million.





# HIGHWAY 68—HOLMAN HIGHWAY WIDENING



## DESCRIPTION



Widen Highway 68 (Holman Highway) from two to four lanes from the vicinity of the Community Hospital of Monterey Peninsula to Highway 1 and improve the intersection of Highway 1 and Highway 68.

## PROJECT PURPOSE

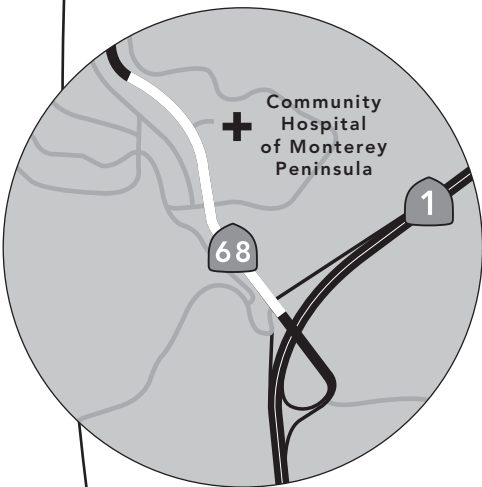
With its present narrow configuration, Holman Highway currently is very congested during peak commute periods and during special events on the Monterey Peninsula. This project, phase 2 of the improvements to this area, will improve emergency access to the hospital and facilitate the flow of traffic between Highway 1 and Pacific Grove.

## PROJECT BENEFITS

- Provides safety improvements
- Improves emergency access for patients going to the Hospital
- Facilitates commuter and other travel to and from Pacific Grove, Pebble Beach, Monterey
- Reduces congestion on Highway 68 leading to the Highway 1 interchange

## COST

The cost of the Highway 68-Holman Highway Widening is estimated at \$29 million.



# US 101-HARRIS ROAD INTERCHANGE

## DESCRIPTION



Construct new freeway interchange and related improvements including connections to frontage roads south of Salinas near Harris Rd at US 101.

## PROJECT PURPOSE

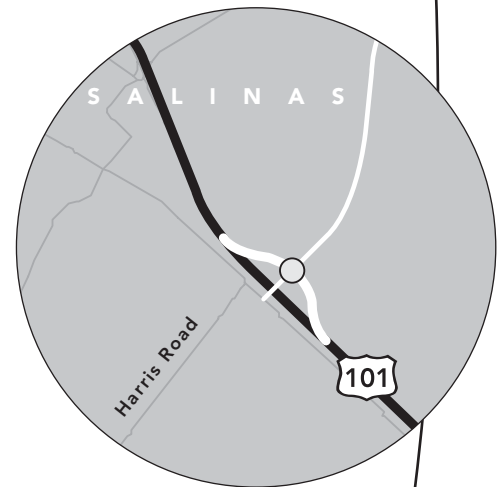
The area near Harris Road is a focus of current and future agricultural commerce. Currently, the lack of an interchange in this area forces trucks to travel south to Spence Road and make a U-turn across fast-moving traffic on US 101. The purpose of this project is to more safely accommodate trucks driving to and from agricultural destinations in the vicinity of Harris Road. The new interchange will connect to future frontage roads on both the east and west sides of US 101 to allow for the diversion of agricultural traffic off of US 101.

## PROJECT BENEFITS

- Facilitates agricultural truck traffic
- Replaces “left on and left off” interchange at Abbott Street
- Improves safety
- Facilitates future congestion relief on US 101

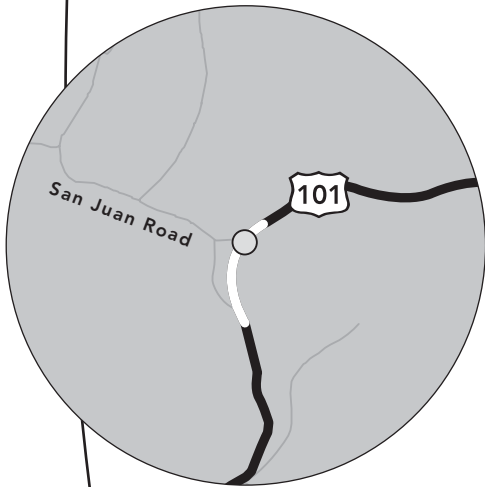
## COST

The cost of the US 101-Harris Road Interchange project is estimated at \$156 million.





# US 101-SAN JUAN ROAD INTERCHANGE



## DESCRIPTION



Construct new interchange and related improvements on US 101 in the vicinity of San Juan Road, near the Red Barn.

## PROJECT PURPOSE

US 101 is the major north-south corridor serving goods movement for the Monterey County and Central Coast agricultural goods. US 101 in this area also has a high crash history and very high traffic volumes of over 53,000 a day. The project will direct traffic from several access roads to one interchange near the Red Barn. By eliminating many left turns and reducing the access points, this new interchange will help improve safety and reduce the congestion along this heavily traveled stretch of US 101 for residents, commuters and agricultural transportation.

## PROJECT BENEFITS

- Addresses safety concerns in a high accident corridor
- Eliminates left turn conflicts
- Reduces delays
- Provides safer access for local businesses and residents
- Improves truck movement

## COST

The cost of the US 101-San Juan Interchange project is estimated at \$92 million.

# US 101-SOUTH COUNTY IMPROVEMENTS

## DESCRIPTION



Construct frontage roads and make contributions towards interchange improvements in Gonzales, Soledad, Greenfield and King City.

## PROJECT PURPOSE

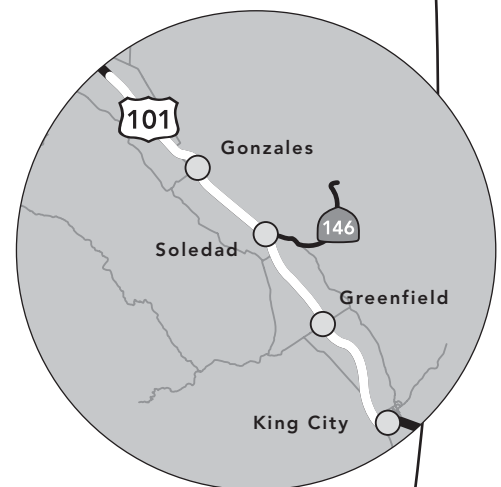
Traffic on US 101 in South County is increasingly impacting the highway as well as adjoining interchanges. The lack of frontage roads means that agricultural trucks must use the highway to make local trips, adding to traffic congestion and forcing U-turns and other tricky maneuvers on US 101. Antiquated interchanges all along US 101 will not be able to accommodate traffic in the near future. The purpose of this project is to improve safety and relieve future traffic congestion by eliminating multiple highway crossings while providing the necessary frontage roads to allow farmers access to their lands. This project also includes funding to assist the cities of Gonzales, Soledad, Greenfield and King City in improving existing interchanges along US 101.

## PROJECT BENEFITS

- Improves safety and relieves traffic congestion on US 101
- Reduces conflicts with slow moving agricultural vehicles
- Supports regional travel between Salinas and south Monterey County cities
- Improves access for local residents

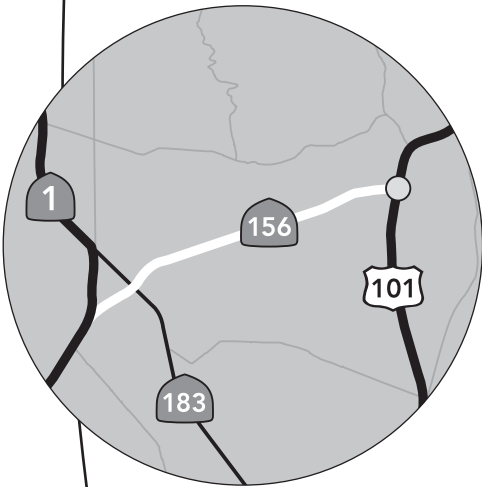
## COST

The cost of the US 101 South County improvements project is estimated at \$62 million, including \$5 million in sales tax funding that each city will receive for interchange improvements.





# HIGHWAY 156 WIDENING AND US 101/156 INTERCHANGE IMPROVEMENTS



## DESCRIPTION



Widen Highway 156 from two to four lanes between Castroville and US 101. Includes construction of a new interchange on Highway 156 near Castroville Boulevard and access improvements to the Oak Hills community as well as interchange modifications at US 101 and Highway 156.

## PROJECT PURPOSE

Highway 156 is the major link connecting the San Francisco Bay area and North Monterey County to the Monterey Peninsula. With its present narrow configuration, it currently operates over capacity, with substantial delays and safety concerns, particularly during special events on the Monterey Peninsula. This congestion affects travel to and from the Peninsula as well as travel between US 101 and Highway 1 for local residents. In addition, the traffic impedes access to the Oak Hills neighborhood. This project will relieve traffic congestion on Highway 156 and at the US 101-156 interchange, while improving safety and local traffic circulation in North Monterey County.

## PROJECT BENEFITS

- Provides traffic congestion relief for 32,000 vehicles per weekday
- Improves access to Oak Hills and other local communities
- Improves safety at intersections
- Supports our \$2 billion per year visitor economy
- Improves movement of valuable goods to market

## COST

The cost to widen Highway 156 and improve the US 101/156 interchange is estimated at \$421 million.

# DEL MONTE/LIGHTHOUSE AVENUE IMPROVEMENTS

## DESCRIPTION

Make safety and operational improvements along Del Monte and Lighthouse Avenues, including improved pedestrian access.

## PROJECT PURPOSE

The Del Monte/Lighthouse Corridor is a regional facility serving travelers to and from the greater Monterey Peninsula. In this highly congested corridor, drivers experience long waits at traffic signals in short left-turn pockets that reduce traffic flow. These roads have narrow travel and parking lanes with a high incidence of side-swipes. The project's purpose is to improve safety along the corridor by constructing roadway improvements. These improvements will also accommodate a rapid bus transit corridor to be funded out of the transit program.

## PROJECT BENEFITS

- Improves safety and vehicle access to Monterey and Pacific Grove
- Improves pedestrian safety and access
- Reduces congestion between Pacific Grove and Seaside

## COST

The cost of the Del Monte/Lighthouse Avenue Improvements is estimated at \$89 million. The City of Monterey is funding a significant portion of matching funds for this project.





# WESTSIDE SALINAS CONNECTOR

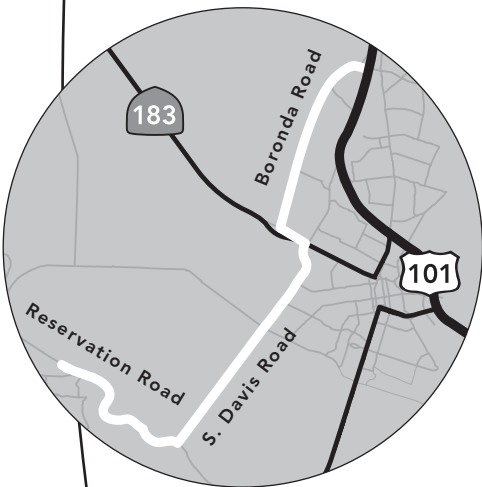


## DESCRIPTION

Construct a new roadway, widen existing roads and provide a rapid bus transit corridor along various segments from near Boronda Road along the west side of Salinas south to and including Reservation Road in the vicinity of Marina to create a new Westside Connector. Includes widening of Davis Road and construction of a new bridge over the Salinas River. The project will include construction of a new connection between Rossi Street and Davis Road as funding permits.

## PROJECT PURPOSE

A significant commute pattern has developed between the Salinas Valley and the Monterey Peninsula cities. As a result, there are high volumes and congestion on the existing routes. One of these routes, Davis Road lacks a year-round crossing of the Salinas River. In addition the west side of Salinas has severe traffic problems and needs a viable alternative to US 101 for north-south travel. This project will create a new west side route to serve travelers along this North Salinas to Marina corridor.



## PROJECT BENEFITS

- Reduces north-south congestion and supports regional travel
- Improves access for local residents
- Reduces road closures due to flooding
- Provides for effective bus transit and bicycle/pedestrian access

## COST

The cost of the Westside Salinas Connector projects is estimated at \$154 million.

# EASTSIDE BYPASS STUDY

## DESCRIPTION

Conduct feasibility study of possible alignments for a bypass from the south Salinas area to the north Prunedale area.

## PROJECT PURPOSE

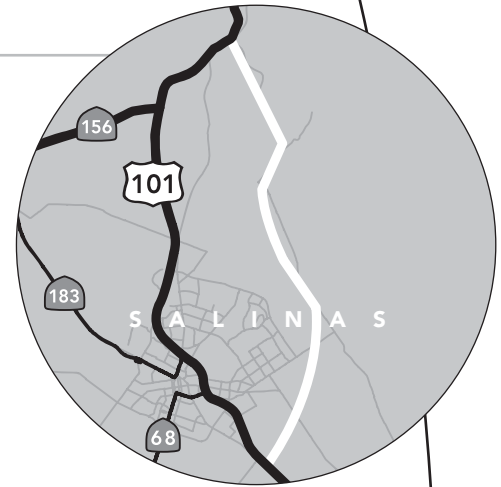
The City of Salinas' adopted general plan calls for an Eastside Bypass of the City to provide a long-term solution to traffic on the congested US 101 corridor in Salinas. This project consists of a plan line study to determine the best route for a future Eastside Bypass project.

## PROJECT BENEFITS

- Identifies alternative route for reduction of congestion and delays on US 101 in the Salinas area
- Supports interregional travel between south Monterey County and the San Francisco Bay area
- Alternative route would improve access for local residents

## COST

\$300,000 is budgeted to study the Eastside Bypass.





# LOCAL ROAD AND STREET MAINTENANCE



## DESCRIPTION

This program will receive 25% of the transportation sales tax funds, estimated at a total of \$245 million over 25 years.

This program will provide flexible funding to cities and the County of Monterey to help them reduce the maintenance backlog on their aging street and road systems. In addition, these funds can be used for other local transportation needs that will minimize accidents, improve operations and traffic flow for all people and transportation modes, including local bicycle and pedestrian projects.

City and county fair shares shall be allocated based 75% on population and 25% on lane miles. The Transportation Agency for Monterey County will update the funding shares annually at the beginning of each fiscal year using Department of Finance population figures and Association of Monterey Bay Area Governments (or equivalent) lane mile data. If the number of incorporated cities changes, the funding calculation shall account for changes in population and lane miles for the new and existing jurisdictions.

## LOCAL STREET AND ROAD MAINTENANCE

Estimated Funding Shares (75% population, 25% lane miles)

Local Agency	Jan. 1, 2006 Population	Lane Miles (2005)	% of Total (2006)	Annual Average (estimated)	25-Year Total (estimated)
Unincorporated County	106,032	2,512	34.3%	\$3,366,617	\$84,167,822
Carmel	4,053	60	1.1%	\$106,439	\$2,661,039
Del Rey Oaks	1,626	19	0.4%	\$39,808	\$995,233
Gonzales	8,737	19	1.7%	\$162,283	\$4,057,187
Greenfield	16,629	44	3.2%	\$314,078	\$7,852,184
King City	11,518	56	2.4%	\$233,043	\$5,826,241
Marina	18,958	129	4.1%	\$406,158	\$10,154,229
Monterey	30,121	235	6.8%	\$663,925	\$16,598,607
Pacific Grove	15,444	129	3.5%	\$345,454	\$8,636,604
Salinas	149,539	578	29.9%	\$2,934,449	\$73,363,327
Sand City	301	10	0.1%	\$11,207	\$280,194
Seaside	34,641	177	7.2%	\$706,396	\$17,660,394
Soledad	28,361	39	5.2%	\$513,143	\$12,828,939
<b>Total</b>	<b>425,960</b>	<b>4,007</b>	<b>100%</b>	<b>\$9,803,000</b>	<b>\$245,082,000</b>

## SAFEGUARDS: LOCAL ROAD AND STREET MAINTENANCE

This program is intended to augment, rather than replace, existing transportation expenditures and therefore cities and the County must meet each of the following requirements to receive funds:

1. Agree to use sales tax funds for transportation purposes only, subject to full repayment for any misuse.
2. Adopt the Transportation Agency for Monterey County's Regional Development Impact Fee ordinance and impose these fees on new development as applicable to assure that development pays for its impacts on the regional transportation system.
3. Verify continued transportation investments of local discretionary monies at the same level as prior years. For purposes of evaluating compliance to this requirement, an average of the prior three years transportation maintenance investments\* will be used.
4. Develop and maintain a Pavement Management Program to ensure timely street maintenance and submit regular public reports on the condition of streets.
5. Submit a written request to the Transportation Agency for Monterey County for its approval identifying the transportation project(s) proposed to utilize the funding, identifying the project name, the general scope of work, the amount requested, and the anticipated year the project will start.
6. Advancements of future funding shares will be considered in order to speed up delivery of projects. Such loans may not interfere with the implementation of other jurisdictions' projects in the program.
7. Submit claims for payment (with back up documentation) for Transportation Agency approved projects, to be paid on a reimbursement basis.

\* *One-time capital expenses are exempt from calculation of past investments.*

Each of the above conditions is subject to verification and annual audit by the Transportation Agency for Monterey County. Sales tax funds not allocated to one or more of the cities or the County as a result of not meeting one of the above requirements shall be redistributed annually at the beginning of each fiscal year according to the formula listed above.





# ALTERNATIVES TO DRIVING



## DESCRIPTION

Programs that support alternatives to driving will receive 25% of the transportation sales tax funds, estimated at a total of \$245 million over 25 years.

## TRANSIT

The Transit program will receive 20% of the transportation sales tax funds, estimated at a total of \$196 million over 25 years. 75% of the transit program funding shall be devoted to rapid bus corridor projects and 25% shall be devoted to the other transit programs and projects.

**Program Benefits:** Investing in the transportation future of Monterey County will require a balanced plan that expands the transportation options available for the traveling public. Improved transit service provides an alternative choice for travelers who want to avoid traffic congestion and reduce automobile pollution. Transit supports efficient land use and economic development. Transit also provides mobility for those individuals who cannot drive or afford a private automobile. Projects eligible for transit program funding are:

- Commuter bus service between Monterey and Salinas
- Transit Service for the Elderly and Persons with Disabilities
- 511 Traveler Information
- New Transit Facilities
- Rapid Bus Corridors (“bus rapid transit”)

# TRANSIT

## COMMUTER BUS SERVICE BETWEEN MONTEREY AND SALINAS

Increase the frequency of bus service between Monterey and Salinas during commuter hours. Eligible projects will include new buses, operating costs and facilities costs necessary to support the new service.

Commuters are looking for alternatives to driving on congested roads between Monterey and Salinas. Bus travel between these two cities is very popular, with buses often at standing room only during rush hour, with long travel times and waits. Increasing the frequency of this commuter bus service will make this alternative to driving more convenient for commuters.

## TRANSIT SERVICE FOR THE ELDERLY AND PERSONS WITH DISABILITIES

The number of Monterey County residents 75 years of age and older is projected to increase from 19,000 in 2000 to 44,000 in 2030. The investment plan includes funding for improved transit services designed to assist the mobility needs of our elderly and disabled residents.

Eligible projects include:

- Expanded Monterey-Salinas Transit RIDES (dial-a-ride) service,
- Support for a county-wide taxi scrip (discount) program, and
- Acquisition of taxi vehicles that accommodate wheelchairs.

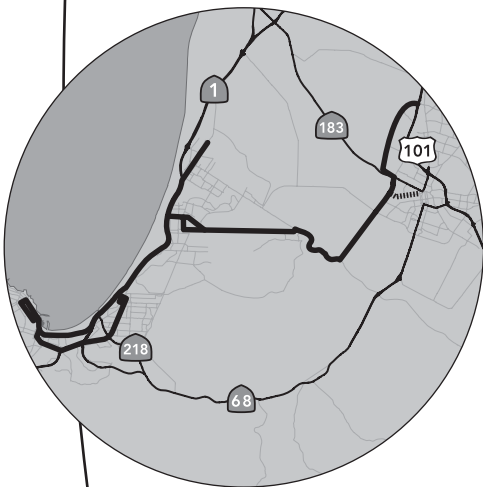
## 511 TRAVEL INFORMATION

Provide free phone and internet information on traffic conditions, incidents and driving times; trip planning, route and fare information for public transportation services; carpool and vanpool referrals; ridematching services; and bicycle route information. Allows travelers to access real-time information on traffic conditions to help minimize the effects of traffic jams. Facilitates travel by bus transit by making trip planning easier. Encourages travel by bicycle by guiding riders to the safest routes.

## NEW TRANSIT FACILITIES

Create new transit centers to consolidate existing activities into more cost effective facilities in order to minimize operating costs.





**Rapid Bus Corridors**  
 **Possible Route**

**RAPID BUS CORRIDORS (“BUS RAPID TRANSIT”)**

Establish rapid bus corridors along the key commute corridors. Eligible corridors include:

- Monterey Branch Line—Monterey to Marina
- Lighthouse Avenue—Pacific Grove to Monterey
- Fremont Avenue—Monterey to Seaside
- 8th Street—Intergarrison Road—Marina toward Salinas
- Westside Salinas Connector
- East Salinas Corridor

Rapid bus corridors, also known as “bus rapid transit”, are an innovative concept to build improvements that allow buses to travel more rapidly than cars in a corridor. Rapid bus corridors operate in a manner similar to rail lines but on a road, allowing flexible use by a variety of bus types. Eligible projects for this program include bus lanes, bus stops, bus priority or “queue jumps” at traffic signals, special bus travel shoulders, technology such as travel time signs and kiosks that support more rapid bus travel, new buses, the cost of operating buses in the corridor and corridor plans.

**SAFEGUARDS: TRANSIT PROGRAM**

Monterey-Salinas Transit, or other eligible applicants, shall apply to the Transportation Agency for Monterey County to approve funding for proposed transit projects. Any application for funds (except for plans and programs) shall be accompanied by a corridor plan outlining the feasibility of the service, including ridership and cost estimates. Capital improvements may be funded by project development phase, by corridor or by corridor segment, as long as the proposed segment provides a benefit to transit travelers independent from the future corridor improvements.

On the Monterey Branch Line, should technical studies indicate that another transit mode, such as light rail transit, would be preferable, then that transit mode will be eligible for funding under this category.

# REGIONAL BICYCLE/PEDESTRIAN FACILITIES

The Regional Bicycle and Pedestrian program will receive 3% of the transportation sales tax funds, estimated at a total of \$29.5 million over 25 years.

## DESCRIPTION

Funds bicycle and pedestrian projects, such as sidewalks, bike lanes or trails, with regional benefits. Eligible projects include, but are not limited to:

**Monterey Bay Sanctuary Scenic Trail:** New paths and trail repairs between Pacific Grove and Santa Cruz County.

**Carmel Hill to River Trail:** Bike/pedestrian trail from Carmel High School to south of Carmel River, including a new bridge.

**Salinas River Bridge:** Bike/pedestrian bridge over Salinas River adjacent to Highway 68.

**Castroville Blvd Path Railroad Crossing:** Undercrossing and paths to connect the existing bike/pedestrian path to the planned Castroville train station and North County High School.

**Highway 218 Bike Lanes** in Del Rey Oaks.

**Blanco Road Bike Lanes** between Salinas and Marina.

## PROGRAM BENEFITS

Safe lanes, paths and sidewalks encourage people to ride bikes or walk instead of driving, which helps improve air quality, lowers greenhouse gasses, makes us healthier and reduces the need for expensive road projects.

## SAFEGUARDS: REGIONAL BICYCLE/PEDESTRIAN FACILITIES

In order to qualify for funding, projects must be included in the regional bicycle plan, be reviewed by the Bicycle and Pedestrian Facilities Advisory Committee and approved by the Transportation Agency for Monterey County.





# SMART GROWTH TRANSPORTATION INCENTIVES



## DESCRIPTION

The Smart Growth Transportation Incentives program will receive 1% of the transportation sales tax funds, estimated at a total of \$9.8 million over 25 years.

This program will build on the Transportation Agency for Monterey County's existing Transportation for Livable Communities program by providing financial incentives to communities for new development that is designed to reduce the need to drive to all destinations. The Transportation Agency for Monterey County will competitively allocate monies in this program to the County or cities as a reward for land use developments that best implement smart growth transportation principles. Funding may be used by the successful grant applicant agency to pay for transportation improvements related to the land use project in their jurisdiction.

## PROGRAM BENEFITS

Smart growth transportation principles encourage new developments to place residences and jobs near shops and services so that people can walk or bike to their destination. "Smart" developments are typically compact and built near transit services, so that residents and workers can take transit to their destinations as well.

The goal of the Smart Growth Transportation Incentives Program is to rebuild and revitalize town centers and main streets, promote infill development, create more walkable communities, encourage transit use, and support an increase in the supply of affordable housing.

## SAFEGUARDS: SMART GROWTH TRANSPORTATION INCENTIVES

The Transportation Agency for Monterey County will periodically conduct a call for Smart Growth Transportation Incentives program applications. Eligible applicants will be the cities in Monterey County and the County of Monterey. The Transportation Agency shall adopt guidelines for award of funding to set project scoring criteria and to assure that the land use projects are constructed within a reasonable period of time; funds shall be reallocated to a future grant cycle if the land use project is not constructed within the required timeframe. Monies shall be distributed as reimbursement for eligible expenses.

# HABITAT CONSERVATION PROGRAM

## DESCRIPTION

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The Habitat Conservation program will receive 1% of the transportation sales tax funds, estimated at a total of \$9.8 million over 25 years.

This program will provide funding for purchase of habitat related to mitigating the impact of transportation projects. The program is intended to provide more flexibility than is currently available by allowing habitat to be purchased and set aside before the approval of the environmental documents and/or above and beyond the strict environmental conservation requirements. Eligible uses of funds include contributions towards purchase of habitat, purchase of interest or credit in a "land conservation bank", and habitat conservation planning.

## PROGRAM BENEFITS

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Transportation projects may have unavoidable impacts to sensitive habitat. All projects in the plan will be carefully designed to preserve sensitive habitat whenever possible. Where impacts are unavoidable, habitat must be preserved elsewhere, to more than offset the project's impacts. The goal of this program is to mitigate habitat impacted by transportation projects in a more comprehensive and cost-effective manner so as to benefit both taxpayers and the environment.

## SAFEGUARDS: HABITAT CONSERVATION PROGRAM

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Expenditures from the Habitat Conservation Program will be consistent with state and federal requirements for the mitigation of impacts to sensitive habitat caused by transportation projects. Habitat conservation efforts will be coordinated with locally active conservation groups such as the Big Sur Land Trust, the Nature Conservancy, and the Elkhorn Slough Foundation to maximize the benefits the Program.





# TAXPAYER SAFEGUARDS

## DESCRIPTION

The investment plan includes strong taxpayer safeguards to ensure that the projects and programs approved by the voters are funded and delivered over its 25-year lifetime. These safeguards are as follows:

**Firm Sunset Date:** This tax will be imposed for a period of 25 years. Collection of the tax will start on April 1, 2009 and cease on April 1, 2034.

**Funds Are Exclusively for Transportation:** Under no circumstances may the proceeds of this transportation sales tax be applied to any purpose other than for the projects, programs and activities identified in this Investment Plan.

**Independent audits:** The sales tax program shall be subject to an annual audit by an independent firm to confirm that the program is meeting the voter-approved requirements in the plan and following accepted accounting standards.

**Published Results of Audits and Annual Reports:** Results of the Independent Audit, Citizens Oversight Committee findings, and the Annual Report must be published and made available to the general public.

**Program Administration:** The Transportation Agency for Monterey County shall have the responsibility for administering and distributing the transportation sales tax proceeds. The Transportation Agency is an independent agency composed of one representative from each city in the county plus the five County supervisors.

**One-Percent Spending Limit on Salaries and Benefits:** The purpose of this measure is to deliver transportation improvements. Administrative costs shall be kept to the minimum required to deliver projects on time and within budget. In no case shall more than 1% of revenues from this measure be used to pay for Transportation Agency administrative salaries and benefits, and only for activities related to the sales tax program.

# TAXPAYER SAFEGUARDS

**Amendments to the Plan:** It is the intent that this plan will be implemented exactly as approved by the voters. However, there may be unforeseen circumstances that occur over the 25-year implementation period. The Transportation Agency may propose amendments to the Plan to respond to unforeseen circumstances, or to provide for the use of additional federal, state, local or other funds. To modify the plan, an amendment must be approved by a  $\frac{2}{3}$  vote of the Transportation Agency for Monterey County Board of Directors, and by a simple majority weighted vote of the Transportation Agency for Monterey County Board of Directors based on population, following a noticed public hearing, a 45-day comment period and Citizens Oversight Committee review.

**Loans Within the Program:** Unspent funds may be loaned from one category to another at prevailing interest rates provided that repayment occurs. Such loans may not interfere with the implementation of programs or projects in the loaning category.

**Bonding Provisions:** Early delivery of projects is a goal of this program. This Investment Plan anticipates accelerating the delivery of projects in the Safety and Congestion Relief Program by issuing bonds. Independent bonding experts have estimated the bonding capability of the program based on market standards and costs. Bonds may be issued to accelerate delivery of capital projects in the Transit and Bicycle/Pedestrian project categories as funding and bond requirements permit. The issuance of bonds is based on the assurances that repayment of bonds is the first priority for the use of sales tax funds.

**Financial Safeguards:** Cost estimates for safety and congestion relief projects were prepared by private sector or State Department of Transportation engineers and reviewed by Transportation Agency professionals. All safety and congestion relief projects include cost contingencies based on the status of the project, with larger contingencies for projects that are less well-developed. Estimated project costs include conservative estimates of inflation, cost of debt, and availability of other revenue sources.



**Citizens Oversight Committee:** A Citizens Oversight Committee representing a diverse range of community interests shall be formed within 6 months of voter approval of this measure. The committee shall meet at least once a year or as often as monthly. Meetings shall be open to the public. The Committee's duties shall be as follows:

- **Independent Audits:** Have full access to the Agency's independent auditor and review the annual audits, have the authority to request and review specific financial information, and provide input on the audit to assure that funds are being expended in accordance with the requirements of this plan;
- **Plan Changes:** Review and make recommendations on any proposed changes to the plan, prior to Transportation Agency Board consideration, subject to a  $\frac{2}{3}$  vote of the voting oversight committee members;
- **Project Delivery and Priorities:** Review and comment on project delivery schedules and make recommendations to the Transportation Agency on any proposals for changing project delivery priorities;
- **Annual and Final Reports:** Prepare annual reports regarding the administration of the program. Report to be presented to the Transportation Agency Board of Directors and published in newspapers of general circulation.



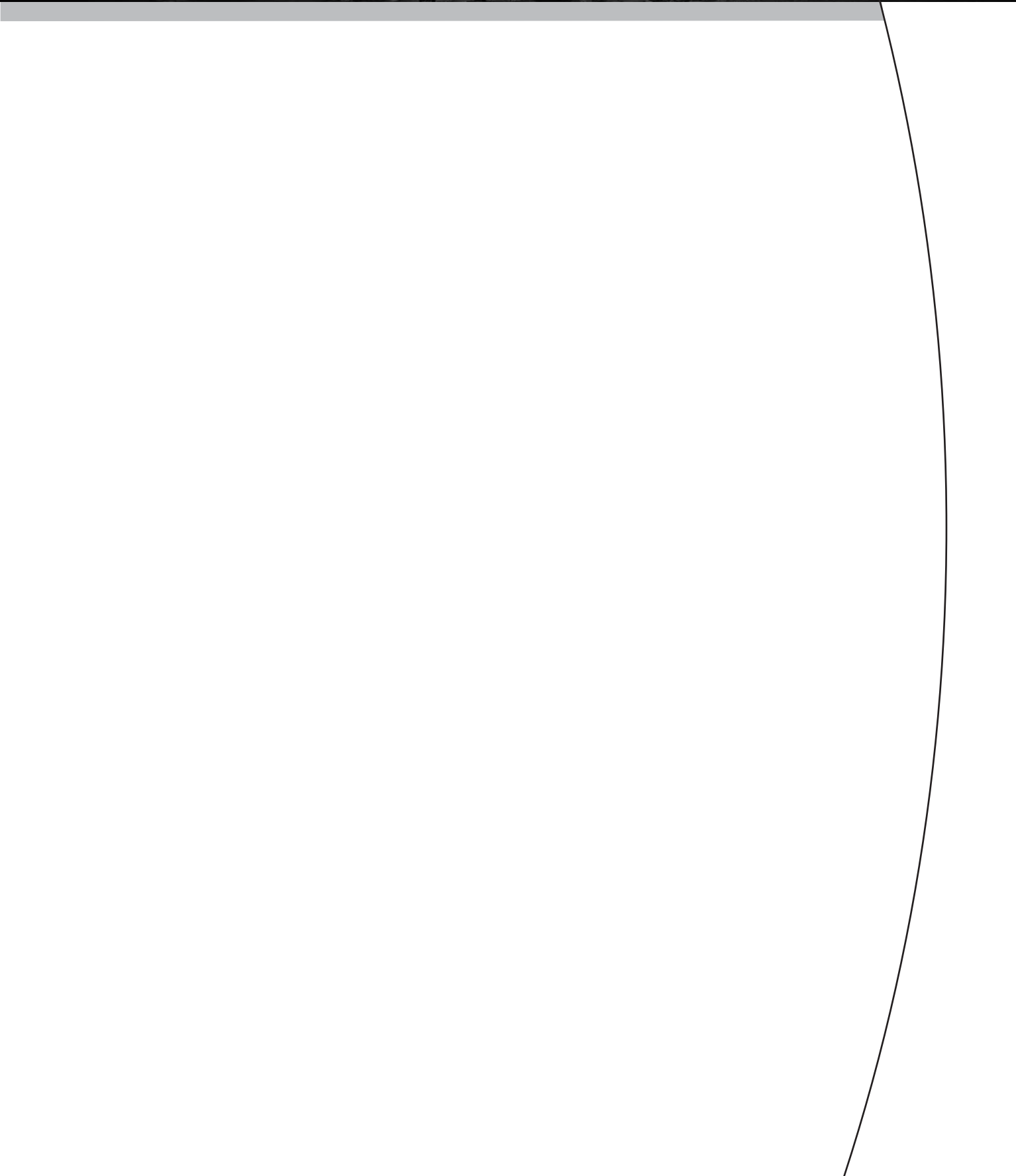
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The Citizens Oversight Committee membership shall be residents of Monterey County and shall include one representative from each of the following organizations or interests:

- League of Women Voters: Monterey Peninsula
- League of Women Voters: Salinas Valley
- A bona fide Taxpayers Association
- Area Agency on Aging
- Bicycle transportation advocate
- Salinas Valley Builders Exchange
- Builders Exchange of the Central Coast
- Central Coast Center for Independent Living
- Central Labor Council
- Chamber of Commerce: Salinas Valley
- Chamber of Commerce: Monterey Peninsula
- Farm Bureau of Monterey County
- Grower-Shippers Association
- Habitat preservation agency such as the Big Sur Land Trust
- Common Ground
- LandWatch Monterey County
- Monterey County Hospitality Association
- Transit user

Members and their alternates shall be nominated by the bona fide organization they are representing and appointed by the Transportation Agency Board of Directors, except that the bicycle transportation advocate, habitat preservation agency and transit user representatives shall be nominated and appointed by the Transportation Agency. Additional members may be appointed by the Transportation Agency Board of Directors to assure that a broad range of geographic and stakeholder interests are represented on the committee; however, in no case shall Committee membership excluding alternates exceed 20. Initial member terms shall be staggered with half serving a 2-year term and half serving a 3-year term as specified by the Transportation Agency. Any member may be reappointed to a 2-year term for an unlimited number of terms.





## TRANSPORTATION AGENCY FOR MONTEREY COUNTY REPRESENTATIVES

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Supervisorial District 1	Supervisor Fernando Armenta
Supervisorial District 2	Supervisor Louis Calcagno, 2nd Vice Chair
Supervisorial District 3	Supervisor Simon Salinas
Supervisorial District 4	Supervisor Ila Mettee-McCutchon
Supervisorial District 5	Supervisor Dave Potter, Chair
City of Carmel-By-The-Sea	Council Member Karen Sharp
City of Del Rey Oaks	Vice-Mayor Jerry Edelen
City of Gonzales	Council Member Maria Orozco
City of Greenfield	Mayor John P. Huerta, Jr., Past Chair
City of King City	Mayor Pro Tem Sue Kleber
City of Marina	Mayor Gary Wilmot
City of Monterey	Council Member Frank Sollecito, Vice Chair
City of Pacific Grove	Council Member Scott Miller
City of Salinas	Council Member Steve Villegas
City of Sand City	City Administrator Steve Matarazzo
City of Seaside	Mayor Ralph Rubio
City of Soledad	Mayor Richard Ortiz

## NON-VOTING EX OFFICIO MEMBERS

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Association of Monterey Bay Area Governments (AMBAG)	Ralph Rubio
Caltrans District 5	Rich Krumholz
Monterey Bay Unified Air Pollution Control District	Jean Getchell
Monterey Peninsula Airport District	William Sabo
Monterey-Salinas Transit (MST)	Carl Sedoryk
City of Watsonville	Manuel Bersamin



TRANSPORTATION AGENCY FOR MONTEREY COUNTY

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