



SamTrans Board of Directors
Meeting of August 6, 2025

Correspondence as of August 4, 2025

Subject

1. Senator Scott Wiener and Senator Jesse Arreguin Joint Letter - Re: Senate Bill 63 (Wiener, Arreguin) – Proposed Five-County Expenditure Plan (July 23, 2025)
2. Assemblymember Diane Papan Letter – RE: Protecting San Mateo County’s Interest in Senate Bill 63 – Proposal for Local Oversight and Equity in Regional Transit Funding (August 1, 2025)
3. Caltrain Letter to Senators Wiener and Arreguin – Subject: Support for SB 63 (Wiener) Caltrain Allocation and Expenditure Plan (July 24, 2025)
4. San Francisco Municipal Transportation Agency (SFMTA) and San Francisco Bay Area Rapid Transit District (BART) Joint Letter – Re: Senate Bill 63 Expenditure Plan and Commitments (July 29, 2025)
5. City/County Association of Governments of San Mateo County (C/CAG) Letter – RE: SB 63 (Weiner) Opt In Recommendation for SamTrans (August 1, 2025)
6. Public Comment: public comment on agenda Item # 9.d.4.ii on August 6 Board agenda
7. Public Comment: Comments on SB 63 - 8/6/25 agenda
8. BART / San Mateo County Next Generation Fare Gate Press Conference and Ribbon Cutting

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California State Senate

SENATOR
SCOTT WIENER

威善高
ELEVENTH SENATE DISTRICT



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SEVENTH SENATE DISTRICT



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July 23, 2025

Sue Noack

Chair, Metropolitan Transportation Commission (MTC)

David Haubert

Chair, Alameda County Transportation Commission (ACTC)

Aaron Meadows

Chair, Contra Costa Transportation Authority (CCTA)

Myrna Melgar

Chair, San Francisco County Transportation Authority (SFCTA) and MTC Commissioner

Jeff Gee

Chair, San Mateo County Transportation District (SMCTD)

Carlos Romero

Chair, San Mateo County Transportation Authority (SMCTA)

Sergio Lopez

Chair, Santa Clara Valley Transportation Authority (SCVTA)

Re: Senate Bill 63 (Wiener, Arreguin) - Proposed Five-County Expenditure Plan

Dear Chairs Noack, Haubert, Meadows, Melgar, Gee, Romero, and Lopez,

We write with an update regarding our work to provide critically needed revenue to preserve and improve public transportation service in the Bay Area. Our region's major public transportation

systems — including BART, AC Transit, Caltrain, and Muni — are at a crossroads. These public transit operators face the prospect of devastating service cuts that would force them into a death spiral after emergency federal and state assistance runs out in the next few years. Other operators — such as SamTrans and VTA — may also face growing financial needs in the coming years as they seek to sustain and enhance services or invest in transit capital projects.

A future with severely diminished public transportation is unacceptable for the Bay Area's residents, visitors, and economy. Close to 60% of Bay Area public transportation riders use transit five or more days per week and 91% expect to ride transit the same or more next year.¹ According to recent polling, two thirds of likely Bay Area voters agree that Bay Area public transit needs more operations funding, and a majority of likely voters in Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara counties would support a sales tax to provide this critically needed funding.²

We introduced SB 63 to authorize a Bay Area sales tax measure that would — in combination with other local strategies — prevent these devastating service cuts while improving the rider experience. Over the past several years, both before and since introducing SB 63, we have engaged with numerous local stakeholders to ensure we understand key considerations related to a potential regional transportation revenue measure. This led us to propose a three-county sales tax measure, with the opportunity for San Mateo and Santa Clara counties to opt in to the measure. We resolved to seek technical assistance from staff at the five county transportation authorities that may be part of the measure, transit operators, and other stakeholders in order to inform a potential expenditure plan.

In order to provide counties with the information they need to determine whether to opt in to the sales tax measure proposed by SB 63, these counties — as well as all of the other counties that are in the measure — need to understand what the expenditure plan would be. **To that end, we propose the following five-county expenditure plan for an SB 63 sales tax measure.** This expenditure plan does *not* contemplate a three- or four-county measure should San Mateo or Santa Clara counties not opt in to a measure. Separate conversations are necessary to determine an expenditure plan for a three- or four-county measure.

Proposed Expenditure Plan Informed by Local Input and Technical Assistance

We would like to thank county transportation authority and transit operator staff for their technical assistance while SB 63 has proceeded through the legislative process. Staff responded in a timely manner to our requests for information related to operator deficits, ridership data, and different ridership-based methodologies for attributing responsibility for operator deficits amongst counties for the purposes of SB 63. We also appreciate MTC for engaging, at the request of various counties, in an independent third-party review of BART's, Caltrain's, Muni's, and AC Transit's deficits. We also thank MTC for providing technical assistance on various measure administrative costs and working to develop more consensus at the commission level on potential transit transformation expenditures and levels. Finally, we appreciate staff at Caltrain

¹ [MTC Travel Survey Summary](#)

² [MTC Polling Report](#)

and its member agencies for socializing and discussing a variety of options to address Caltrain's reported deficit. To date, this specific expenditure plan was not provided or explicitly endorsed by specific staff or local boards, but it is informed by the described technical assistance.

Existing transit funding relationships among Bay Area counties and transit operators are complex and varied, making it especially challenging to develop an expenditure plan for a regional measure that both addresses key transit needs and is as fair and consistent as possible. This technical assistance we received from local agency staff and policy makers was instrumental in helping us develop an expenditure plan that results in counties paying for systems their residents use in a fair manner.

We acknowledge the complexity and long history behind existing Bay Area public transportation agency funding relationships. This expenditure plan is not intended to set a new precedent for locally governed funding relationships. Rather, it provides medium-term stability for public transit systems in a manner that is as fair and consistent as possible, allowing transit systems to maintain service while longer term conversations over local funding relationships can continue as needed.

Revenue Measure Overview

Revenue Mechanism: Sales Tax

Geography: Counties of Alameda, Contra Costa, San Mateo, and Santa Clara and the City and County of San Francisco

Rates: ½ cent in Alameda, Contra Costa, San Mateo, and Santa Clara Counties and one cent in San Francisco

Duration: 14 years

Expenditure Plan Overview

The expenditure plan included in SB 63 will dedicate a specified *percentage of the total measure* for each recipient referenced in the expenditure plan. These target funding amounts are informed by technical assistance received during the expenditure plan development process. The designated recipients are:

- The Transportation Revenue Measure District (TRMD) created by the bill, for administration
 - The administrative allocation is 0.22% (calculated as the sum of 0.25% of each county's ½-cent revenue generation)
 - In addition to an annual administrative allocation, one-time administrative costs to be taken off the top of the measure, including the financial efficiency review and ballot-related expenses
- MTC, to implement rider-focused transit improvements, consistent with the Bay Area's 2021 Transit Transformation Action Plan (T-TAP):
 - Fare programs (Clipper START and free/discounted transfers)
 - Accessibility
 - Transit Priority (including Transit Signal Priority) and Mapping and Wayfinding

- The Transit Transformation allocation is 4.4% (calculated as the sum of 5% of each county's ½-cent revenue generation)
- MTC to allocate to the following operators for public transit operations expenses. Note that additional conversations related to accountability of such funds continue and will be further socialized prior to planned opt-in votes by counties. For example, the language regarding the financial efficiency review is being finalized. Also, San Mateo County partners have expressed a desire for additional accountability measures. The operators to receive their specified allocations from MTC are:
 - BART
 - Caltrain
 - Caltrain figure is based on a distribution discussed at the most recent Caltrain ad hoc meeting. Additional conversations by Caltrain member agencies to confirm this figure continue. The Caltrain funding amount shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.
 - AC Transit
 - Muni
 - SF Bay Ferry
 - Golden Gate Transit
 - Alameda County small bus operators dedicated pot (LAVTA and Union City Transit)
 - The magnitude of the allocations to each individual operator identified in this pot determined by ACTC on an annual basis
 - Contra Costa County small bus operators dedicated pot (County Connection, Tri Delta Transit, and WestCAT)
 - The magnitude of the allocations to each individual operator identified in this pot determined by CCTA on an annual basis
- The following county transportation entities receive all remaining funds – if any – generated in their counties not used for the transit operators/initiatives in the expenditure plan, for public transportation expenses, with no ability for the TRMD/MTC to withhold these funds
 - ACTC
 - CCTA
 - SFCTA
 - SMCTD
 - SCVTA

Expenditure Plan – Annual TRMD/MTC Funding

Entity/Purpose	% of Measure	FY 31 \$s (\$millions)
TRMD, Administration	0.22%	\$2.32
MTC, rider-focused T-TAP	4.4%	\$46.40

In the bill, MTC Transit Transformation amounts will be split up into the below programs:

MTC Transit Transformation Detailed Breakdown

Program/Investments	% of Measure	FY 31 \$s (\$millions)
Clipper START/Free Transfers	2.5%	\$25.78
Accessibility	1.0%	\$10.31
Transit Priority (i.e. TSP) and Mapping and Wayfinding	1.0%	\$10.31
Totals	4.4%	\$46.40

Operator Recipients (percents and dollars rounded to the nearest whole number, except when percentage is under 3%, where it is rounded to the nearest tenth, or dollar amount is under \$30, where it is rounded to the nearest hundredth)

Operator	% of Measure	FY 31 \$s (\$millions)
BART*	31%	\$330
AC Transit	5%	\$51
Muni*	16%	\$170
Caltrain**	7%	\$75
Alameda County Small Bus Operators (LAVTA and Union City Transit)	0.5%	\$5.25
Contra Costa County Small Bus Operators (County Connection, Tri Delta Transit, and WestCAT)	1.5%	\$15.75
SF Bay Ferry	0.7%	\$7
Golden Gate Transit	0.1%	\$1

*Conversations with specific counties regarding accountability related to BART and Muni continue. The legislative approach to accountability shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.

**The Caltrain funding figure is provisional pending further confirmation from member agencies. The Caltrain funding figure shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.

County Transportation Entities (percents and dollars rounded to the nearest whole number, except when percentage is under 3%, where it is rounded to the nearest tenth, or dollar amount is under \$30, where it is rounded to the nearest hundredth)

Entity	% of Measure	FY 31 (\$s) (\$millions)
ACTC	1.0%	\$10.26
CCTA	2.5%	\$26.51
SFCTA	0%	\$0
SMCTD	4.7%	\$50.00
VTA	25.1%	\$264.07

Resolution Related to Accountability and Financial Efficiency is Necessary

Separate from the discussion of the expenditure plan, we continue to work with local stakeholders to finalize the financial efficiency review language in the bill. Additionally, San Mateo County partners have expressed a desire for additional accountability measures. We will be in touch with relevant staff and stakeholders on this language. The legislative approach to accountability shall be resolved prior to planned San Mateo and Santa Clara meetings where relevant boards will discuss opting in to the measure.

Thank you for your consideration of the proposed five-county SB 63 expenditure plan. Should you have any questions, please reach out to us directly or to Raayan Mohtashemi or Luis Amezcua on our staff at raayan.mohtashemi@sen.ca.gov or luis.amezcua@sen.ca.gov.

Sincerely,



Scott Wiener
Senator, 11th District



Jesse Arreguin
Senator, 7th District

Cc:

President Pro Tempore Mike McGuire - Member, Bay Area Caucus

Speaker Robert Rivas - Member, Bay Area Caucus

Senator Josh Becker - Chair, Bay Area Caucus

Assemblymember Buffy Wicks - Vice-Chair, Bay Area Caucus and Chair, Assembly Appropriations Committee

Senator Dave Cortese - Chair, Senate Transportation Committee

Assemblymember Lori Wilson - Chair, Assembly Transportation Committee

Senator Jerry McNerney - Chair, Senate Revenue and Taxation Committee

Assemblymember Mike Gipson - Chair, Assembly Revenue and Taxation Committee

Senator Anna Caballero - Chair, Senate Appropriations Committee

Candace Andersen, President, Contra Costa County Board of Supervisors and MTC Commissioner
Rafael Mandelman, President, City and County of San Francisco Board of Supervisors
David Canepa, President, San Mateo County Board of Supervisors and MTC Commissioner
Otto Lee, President, Santa Clara County Board of Supervisors
Barbara Lee, Mayor, City of Oakland and MTC Commissioner
Daniel Lurie, Mayor, City and County of San Francisco
Matt Mahan, Mayor, City of San Jose and MTC Commissioner
Gary Singh - Mayor, City of Union City
Margaret Abe-Koga, MTC Commissioner
Marilyn Ezzy Ashcraft, MTC Commissioner
Pat Burt, MTC Commissioner
Alicia John-Baptiste, MTC Commissioner
Nate Miley, MTC Commissioner
Gina Papan, MTC Commissioner
Adam Rak - Chair, City/County Association of Governments of San Mateo County (C/CAG)
Mark Foley - Chair, Bay Area Rapid Transit District (BART)
Diane Shaw - President, Alameda-Contra Costa Transit District (AC Transit)
Janet Tarlov - Chair, San Francisco Municipal Transportation Agency (SFMTA) Board of Directors
Steve Heminger - Chair, Peninsula Corridor Joint Powers Board (Caltrain)
Kevin Wilk - Chair, Central Contra Costa Transit Authority (County Connection)
Diane Burgis - Chair, Eastern Contra Costa Transit Authority (Tri Delta Transit)
Tiffany Grimsley - Chair, Western Contra Costa Transit Authority (WestCAT)
Julie Testa - Chair, Livermore Amador Valley Transit Authority (LAVTA)
Jim Wunderman - Chair, San Francisco Bay Ferry
Gerald D. Cochran - President, Golden Gate Bridge Highway and Transportation District
Andrew Fremier - Executive Director, MTC
Tony Tavares - Executive Director, ACTC
Timothy Haile - Executive Director, CCTA
Tilly Chang - Executive Director, SFCTA
April Chan - General Manager/CEO, SMCTD and Executive Director, SMCTA
Carolyn Gonot - General Manager/CEO, SCVTA
Sean Charpentier - Executive Director, C/CAG
Robert Powers - General Manager, BART
Salvador Llamas - General Manager/CEO, AC Transit
Julie Kirschbaum - Director of Transportation, SFMTA
Michelle Bouchard - Executive Director, Caltrain
Bill Churchill - General Manager, County Connection
Rashidi Barnes - CEO, Tri Delta Transit
Rob Thompson - General Manager, WestCAT
Christy Wegener - Executive Director, LAVTA
Stephen Adams - Transit Manager, Union City Transit
Seamus Murphy - Executive Director, San Francisco Bay Ferry
Denis Mulligan - General Manager, Golden Gate Bridge Highway and Transportation District

Senator Christopher Cabaldon - Member, Bay Area Caucus

Senator Tim Grayson - Member, Bay Area Caucus

Senator Aisha Wahab - Member, Bay Area Caucus

Assemblymember Cecilia M. Aguiar-Curry - Member, Bay Area Caucus

Assemblymember Patrick J. Ahrens - Member, Bay Area Caucus

Assemblymember Anamarie Avila Farias - Member, Bay Area Caucus

Assemblymember Rebecca Bauer-Kahan - Member, Bay Area Caucus

Assemblymember Marc Berman - Member, Bay Area Caucus

Assemblymember Mia Bonta - Member, Bay Area Caucus

Assemblymember Damon Connolly - Member, Bay Area Caucus

Assemblymember Matt Haney - Member, Bay Area Caucus

Assemblymember Ash Kalra - Member, Bay Area Caucus

Assemblymember Alex Lee - Member, Bay Area Caucus

Assemblymember Liz Ortega - Member, Bay Area Caucus

Assemblymember Diane Papan - Member, Bay Area Caucus

Assemblymember Gail Pellerin - Member, Bay Area Caucus

Assemblymember Chris Rogers - Member, Bay Area Caucus

Assemblymember Catherine Stefani - Member, Bay Area Caucus

County	Tax Rate	Revenue Generated*	Admin**	T-TAP**	BART	AC Transit	Muni	Caltrain	East Bay Small Bus	SF Bay Ferry	GGBHTD	Remaining Revenue	% County Share Left	% Measure Left	
AC	0.5%	\$ 216	\$ 0.54	\$ 10.80	\$ 139.76	\$ 45.90			\$ 5.25	\$ 3.50		\$ 10.26	4.75%	0.97%	Remaining revenue goes to ACTC
CC	0.5%	\$ 138	\$ 0.35	\$ 6.90	\$ 80.85	\$ 5.10	\$ 1.50		\$ 15.75	\$ 1.05		\$ 26.51	19.21%	2.51%	Remaining revenue goes to CCTA
CCSF	1%	\$ 252	\$ 0.32	\$ 6.30	\$ 73.43		\$ 158.51	\$ 10.00		\$ 2.45	\$ 1.00	\$ 0.00	0.00%	0.00%	
SMC	0.5%	\$ 135	\$ 0.34	\$ 6.75	\$ 35.97		\$ 9.99	\$ 32.50				\$ 49.45	36.63%	4.69%	Remaining Revenue goes to SMCTD
SCC	0.5%	\$ 313	\$ 0.78	\$ 15.65				\$ 32.50				\$ 264.07	84.37%	25.0538%	Remaining Revenue goes to VTA
Totals		\$ 1,054	\$ 2.32	\$ 46.40	\$ 330.00	\$ 51.00	\$ 170.00	\$ 75.00	\$ 21.00	\$ 7.00	\$ 1.00	\$ 350.28		33.23%	
Percentages			0.22%	4.40%	31.31%	4.84%	16.13%	7.12%	1.99%	0.66%	0.09%	33.23%			
													Total \$	\$ 1,054.00	
Admin**	0.25%	\$ 2.32											Total %	100.00%	
T-TAP***	5.0%	\$ 46.40													

*FY 31 HDL Tax Projections

**Calculated as percentage of 0.5-Cent revenue generation, regardless of the county's tax rate

East Bay Small Operators Breakdown

County	\$	% Measure
AC Pot	\$ 5.25	0.5%
CC Pot	\$ 15.75	1.5%

Transit Transformation Breakdown

T-TAP	\$	Share	Total \$	Total %
Fares	\$ 25	56%	\$ 25.78	2.45%
Access	\$ 10	22%	\$ 10.31	0.98%
TP & WF	\$ 10	22%	\$ 10.31	0.98%
Totals	\$ 45	100%	\$ 46.40	4.40%

Overall Operator Funding Targets

BART	AC Transit	Muni	Caltrain	Small Bus	WETA	GGBHTD
330	51	306	75	21	7	1
		170.0				

Attribution Percentages

	BART	AC Transit	Muni	Caltrain	Small Bus	WETA	GGBHTD
AC	42.35%	90%			25%	50%	
CC	24.50%	10%	0.49%		75%	15%	
CCSF	22.25%		96.2%	13.33%		35%	100%
SMC	10.90%		3.3%	43.33%			
SCC				43.33%			
Totals	100.0%	100%	100%	100%	100%	100%	100%

Attribution \$\$'s (\$millions)

	BART	AC Transit	Muni	Caltrain	Small Bus	WETA	GGBHTD	Totals
AC	\$ 139.76	\$ 45.90			\$ 5.25	\$ 3.50		\$ 194.41
CC	\$ 80.85	\$ 5.10	\$ 1.50		\$ 15.75	\$ 1.05		\$ 104.25
CCSF	\$ 73.43		\$ 158.51	\$ 10.00		\$ 2.45	\$ 1.00	\$ 245.38
SMC	\$ 35.97		\$ 9.99	\$ 32.50				\$ 78.46
SCC				\$ 32.50				\$ 32.50
Totals	\$ 330.0	\$ 51.0	\$ 170.0	\$ 75.0	\$ 21.0	\$ 7.0	\$ 1.0	\$ 655.00

County	Sperry 0.5-Cent Revenue				HDL 0.5-Cent Revenue			
	Generation		Generation		Generation		Generation	
	FY 28	FY 31	FY 28	FY 31	FY 28	FY 31	FY 28	FY 31
AC	\$	222	\$	243	\$	203	\$	216
CC	\$	126	\$	137	\$	127	\$	138
CCSF	\$	107	\$	117	\$	114	\$	126
SMC	\$	124	\$	135	\$	121	\$	135
SCC	\$	322	\$	352	\$	282	\$	313
Totals	\$	901	\$	984	\$	847	\$	928

Supporting Material - SB 63 Expenditure Plan

County Revenue Distribution Detail

Illustrates the county-by-county attributions of operator deficits that were used to inform the amount of revenue returned to each county's relevant county transportation entity.

County Revenue Distribution Detail - Attribution Dollars (\$ millions, FY 31 HDL)

Operator /County	BART	AC Transit	Muni	Caltrain **	LAVTA & Union City Transit	County Connection, Tri Delta Transit, & WestCAT	SF Bay Ferry	Golden Gate Transit
AC	\$139.76	\$45.90			\$5.25		\$3.50	
CC	\$80.85	\$5.10	\$1.50			\$15.75	\$1.05	
CCSF	\$73.43		\$158.51	\$10			\$2.45	\$1.00
SMC	\$32 in current year dollars as described at SamTrans and SMCTA, \$35.97* in FY 31		\$9.99*	\$32.5				
SCC				\$32.5				
Totals	\$330	\$51	\$170	\$75	\$5.25	\$15.75	\$7.00	\$1.00

*Conversations with San Mateo regarding accountability related to BART and Muni continue.

The legislative approach to accountability shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.

**The Caltrain funding figure is provisional pending further confirmation from member agencies. The Caltrain funding figure shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.

Attribution Percentages

Operator /County	BART	AC Transit	Muni	Caltrain **	LAVTA & Union City Transit	County Connection, Tri Delta Transit, & WestCAT	SF Bay Ferry	Golden Gate Transit
AC	42.35%	90%			100%		50%	
CC	24.50%	10%	0.49%			100%	15%	
CCSF	22.25%		96.2%	13.33%			35%	100%
SMC	10.90%*		3.3%*	43.33%				
SCC				43.33%				

*Conversations with San Mateo regarding accountability related to BART and Muni continue.

The legislative approach to accountability shall be resolved prior to planned San Mateo and Santa Clara board meetings where relevant boards will discuss opting in to the measure.

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Sales Tax Revenue Projections

Attachment B to this letter illustrates the FY 31 HDL sales tax projections - provided by CCTA. FY 31 was used as a rough early midpoint for the measure to provide a more balanced projection of expected revenue for each recipient during the life of the measure. We selected a year that's earlier than the midpoint to account for the fact that operator deficit estimates are more reliable closer to year 1 of the measure. The FY 31 HDL projections are relatively conservative and thus similar to the FY 28 Sperry projections used by MTC.

FY 31 HDL and FY 28 Sperry Projections (\$ millions)*

County	FY 31 HDL Revenue Projection (Courtesy CCTA)	FY 28 Sperry Projection (Courtesy MTC)
Alameda County	\$216	\$222
Contra Costa County	\$138	\$126
City & County of San Francisco	\$252	\$214
San Mateo County	\$135	\$124
Santa Clara County	\$313	\$322
Totals	\$1,054	\$1,008

*Assumes ½-Cent Sales Tax Rate in Alameda, Contra Costa, San Mateo, and Santa Clara counties, and 1 Cent Sales Tax Rate in the City and County of San Francisco



August 1, 2025

April Chan
Chief Executive Officer
San Mateo County Transit District
1250 San Carlos Ave.
San Carlos, CA 94070

RE: Protecting San Mateo County's Interest in Senate Bill 63 – Proposal for Local Oversight and Equity in Regional Transit Funding

Dear Ms. Chan:

Senate Bill 63 proposes a ½-cent regional sales tax to support public transit throughout the Bay Area, taxing five of the nine Bay Area Counties including Contra Costa, Alameda, San Francisco, San Mateo and Santa Clara counties with revenues to be distributed among several major transit operators.

While this regional approach to transit funding is contemplated to facilitate system wide financial stability, it presents unique equity and governance challenges for San Mateo County.

Under the bill as drafted, San Mateo County would contribute substantial tax revenue to transit agencies based outside its jurisdiction—particularly the Bay Area Rapid Transit District (BART) and the San Francisco Municipal Railway (MUNI). San Mateo County lacks any representation, service parity, or operational oversight of these systems, nor does San Mateo County or locally governed transit agencies maintain any contractual service agreements or arrangements with either BART or MUNI that provide any such oversight or operational influence.

Both BART and MUNI provide limited service within the county as does the San Mateo County Transit District (SamTrans) provide limited service to both San Francisco and Santa Clara counties. These informal and traditional arrangements are both common and mutually beneficial between local jurisdictions and overlapping or adjacent transit services. Such overlapping services have never had any formal alignment or contractual basis however nor has funding ever been demanded or expected as part of these overlapping or connected services.

Under SB 63, San Mateo County residents will be taxed to directly subsidize such services, to the mutual benefit of riders from adjacent jurisdictions and the communities therein, yet SB 63 offers no reciprocal investment in San Mateo County transit services from those adjacent jurisdictions nor offers any accountability measures to protect the interests of both riders and taxpayers in San Mateo County.

The Need for San Mateo County Oversight in a Regional Framework

Regional investment must reflect both shared responsibility in maintaining a robust regional transit network as well as operational influence. Requiring San Mateo County taxpayers to fund services directed by agencies beyond their democratic control—without any meaningful voice in operational decisions—sets a novel and perhaps detrimental precedent for regional collaboration.

In no other Bay Area transportation finance measure has a county been asked to contribute so substantially to out-of-county agencies without representation or reciprocal investment. Under prior bridge toll measures such as RM3, for example, revenue flows were determined and managed with defined return-to-source formulas or allocations governed by the Metropolitan Transportation Commission (MTC) with county input.

San Mateo County's Unique Position

San Mateo County is served by a constellation of regional systems (BART, Caltrain, MUNI, and SamTrans), yet has operational control only over SamTrans and shares control over Caltrain through the Peninsula Corridor Joint Powers Board.

Without safeguards, SB 63 would institutionalize a flow of tax revenue to external agencies with no binding agreement or oversight tool to deliver equitable service or improvements in return and to guarantee that such subsidies are expended on the operational and service needs of riders emanating from San Mateo County.

To safeguard local interests while still supporting the regional vision of SB 63, this memo outlines proposed amendments to ensure San Mateo County's contributions yield fair returns in service, limited oversight, and infrastructure investment.

Proposed Amendments: Oversight, Equity, and Accountability for San Mateo County

1. Creation of a San Mateo County Regional Measure Oversight Committee (ROC)

The San Mateo County Regional Measure Oversight Committee (ROC) shall provide governance, oversight, and enforcement of performance standards for transit services funded by the regional sales tax within San Mateo County. The ROC shall have authority

over all funds allocated to BART and MUNI that are attributable to San Mateo County taxpayers.

ROC Membership

The ROC shall consist of the following five voting members:

1. **Elected Member of the San Mateo County Transit District (SamTrans) Board**
(Excluding any member of the San Mateo County Board of Supervisors).
2. **Member of the City/County Association of Governments Board (C/CAG) of San Mateo County**
(Excluding any member of the San Mateo County Board of Supervisors).
3. **Member of the San Mateo County Transportation Authority Board (SMCTA)**
(Excluding any member of the San Mateo County Board of Supervisors).
4. **Member of the San Mateo County Board of Supervisors**
5. **San Mateo County Controller**

2. Revenue Flow for San Mateo County (SMC)

- Regional sales tax revenue collected within San Mateo County and designated for BART or MUNI shall be subject to performance-based release as determined by the ROC.
- No fixed portion of these funds shall be automatically transferred; instead, the entirety of San Mateo County's contributions to BART and MUNI shall be conditionally disbursed based on compliance with oversight terms established by the ROC.

3. ROC Responsibilities and Enforcement Authority

The ROC shall be responsible for negotiating, adopting, and enforcing binding Interagency Agreements with BART and MUNI that govern service and funding obligations related to San Mateo County. These agreements shall include provisions for:

- **Minimum service levels** within San Mateo County (including station coverage, headways, and span of service).
- **Station maintenance** standards, including cleanliness, lighting, safety, and amenities.
- **Fare structure coordination** across BART, MUNI, SamTrans, and Caltrain to ensure equity and accessibility.
- **Schedule integration** to optimize transfers between agencies serving San Mateo County riders.

- **Enforceable benchmarks** to achieve medium to long term sustainability.

Enforcement Mechanisms

If BART or MUNI fails to meet the performance obligations established in the Interagency Agreements, the ROC shall have the authority to:

- Issue formal notices of noncompliance, with defined timelines to cure deficiencies.
- **Withhold any or all funds** otherwise designated for the noncompliant agency, without limitation, until full compliance is achieved.
- Redirect unspent or withheld funds to **SamTrans projects** that benefit San Mateo County riders, upon conclusion of the regional measure's collection period.

4. Equitable Service Provisions

Because ridership and farebox recovery depend on timely, consistent, and coordinated service, the legislation must include enforceable **regional equity standards**:

- **No Disproportionate Service Cuts:** Any reductions by BART or Caltrain must be proportional across counties. San Mateo County shall not bear a greater share of cuts relative to other service areas.
- **MUNI Service Protections:** If MUNI receives funds for service in or out of San Mateo County, any cuts to San Mateo County routes must be no more severe than cuts elsewhere in the system during the lifespan of the tax.
- **Schedule Coordination Mandate:** All participating agencies must coordinate timetables for transfers and connections, particularly at intermodal hubs, to optimize system wide utility and ridership.

5. Fare Equity and Surcharge Prohibition

- **No Additional Surcharges:** SB 63 must prohibit BART or any other operator from imposing additional charges on San Mateo County riders based on county origin or ridership volume. Fare structures must be equitable and regionally consistent.

6. Enforceable Station Operations Standards

All BART and MUNI stations within San Mateo County must meet minimum enforceable standards for:

- Cleanliness
- Lighting and visibility
- Public safety

Failure to meet these standards will trigger:

- Financial penalties to the operator, OR

- Reimbursement costs for corrective actions undertaken by SamTrans or local jurisdictions.

7. Commercial Development and Shared Use at Transit Stations

To enhance the passenger experience and generate sustainable station revenue, operators shall:

- **Collaborate with local governments** to permit retail and commercial activities in station common areas.
- **Facilitate shared parking arrangements** at intermodal stations to allow access by nearby commercial tenants and other transit operators.
- **Engage local economic development agencies** in long-term station area planning.

8. Sunset and Scope of the ROC

- The SamTrans ROC's authority shall apply only to SB 63's 2026 sales tax measure.
- The ROC shall sunset upon full expenditure of the measure's proceeds, unless extended by a future statute.

Thank you in advance for your consideration of this proposal. If you have any questions or concerns, please feel free to contact my office.

Respectfully,

A handwritten signature in black ink, appearing to read 'Diane Papan', with a stylized, flowing script.

Diane Papan
Assemblymember
District 21



BOARD OF DIRECTORS 2025

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EXECUTIVE DIRECTOR

July 24, 2025

The Honorable Scott Wiener
California State Senate
1021 O Street, Suite 6630
Sacramento, CA 95814

The Honorable Jesse Arreguín
California State Senate
1021 O Street, Suite 6710
Sacramento, CA 95814

Subject: Support for SB 63 (Wiener) Caltrain Allocation and Expenditure Plan

Dear Senators Wiener and Arreguín,

On behalf of Caltrain, we want to thank you for your continued efforts to authorize a regional revenue measure (SB 63) that would support public transit in our region. At a special Board meeting on July 23, 2025, and with the benefit of the information contained in your letter of the same date, the Peninsula Corridor Joint Powers Board (JPB) voted 7-0 to endorse the following terms for the allocation of regional transit measure funds intended for Caltrain. These terms are consistent with the expenditure plan outlined in your July 23rd letter.

1. The funding target for Caltrain in the regional transit measure should be approximately \$75 million, which Caltrain will use to fund its operating expenses, and which will serve as a cap on operating contributions from the regional transit measure and member agencies for the duration of the measure.
2. The annual allocation of these regional funds among the Caltrain member agencies should be approximately: \$32.5 million for Santa Clara County, \$32.5 million for San Mateo County, and \$10 million for the City and County of San Francisco. The precise amounts will be specified in the bill text. This allocation between member agencies is for the sole use of SB 63 and will not set a precedent for future allocations.
3. This allocation formula should be limited to the term of the regional transit measure and should not set a precedent regarding potential amendments to the Joint Powers Agreement (JPA).
4. The member agencies will resume discussions concerning potential JPA amendments with the goal of resolving inconsistencies and ambiguities and eliminating duplicative agreements.

PENINSULA CORRIDOR JOINT POWERS BOARD

1250 San Carlos Avenue
San Carlos, CA 94070 (650) 508-6200

5. The JPB recognizes SamTrans investment in the acquisition of the right-of-way, its leadership during times of crisis, and the challenges the member agencies have faced as a partnership. The JPB is committed to finding a new path forward where we can work better together on behalf of our riders.

The allocation described in the second term is the result of a compromise among the members of the JPB Ad Hoc Governance Committee, which had discussed multiple options for a formula to allocate member agency responsibility for Caltrain's operating deficit. Faced with divergent positions from the Santa Clara Valley Transportation Authority and the San Mateo County Transit District and understanding San Francisco's financial limitations, the Ad Hoc Committee agreed to put the rationale for their respective formula positions to the side and compromise on an allocation that had an even split between VTA and SamTrans (see term 2). In addition, the Ad Hoc Committee agreed that this decision would not establish a precedent for future discussions concerning the JPA.

During the Caltrain Board meeting on July 23, members of the JPB unanimously supported the proposed terms listed above and acknowledged the significance of the regional transit measure for Caltrain. They also recognized SamTrans's leadership in the acquisition of the right-of-way and the administration of Caltrain. The three-county Board reaffirmed their collective commitment to working together in close partnership to forge a path forward – one that strengthens Caltrain and better serves its riders and the region.

We deeply appreciate your leadership in authoring SB 63 and ensuring a promising future not just for Caltrain's riders but also for the broader region. We look forward to working with you on the successful enactment of SB 63.

Sincerely,



Steve Heminger

Chair, Caltrain Board of Directors

cc: Caltrain State Delegation
Peninsula Corridor Joint Powers Board of Directors
San Francisco County Transportation Authority Board of Directors
San Francisco Municipal Transportation Agency Board of Directors
San Mateo County Transit District Board of Directors
San Mateo County Transportation Authority Board of Directors
Santa Clara County Valley Transportation Authority Board of Directors



July 29, 2025

April Chan

General Manager and Chief Executive Officer, San Mateo County Transit District (SMCTD) and Executive Director, San Mateo County Transportation Authority (SMCTA)

Sean Charpentier

Executive Director

City/County Association of Governments of San Mateo County (C/CAG)

Via Email

Re: Senate Bill 63 Expenditure Plan and Commitments

Dear General Manager/CEO Chan and Executive Director Charpentier,

On behalf of the San Francisco Municipal Transportation Agency (SFMTA) and the San Francisco Bay Area Rapid Transit District (BART), we are writing to express our sincere gratitude for your continued partnership and support to keeping regional transit service operating and well-funded. Your commitment to a robust and integrated transportation network is vital for the economic vitality and quality of life across our shared communities.

The SFMTA ("Muni") carries approximately ten percent of transit boardings among all operators in San Mateo County. Muni provides service on eleven bus routes that cover portions of North San Mateo County, many of which operate every 8 to 12 minutes during the morning peak. On average, a Muni bus enters or leaves San Mateo County every 40 seconds. The routes that serve San Mateo County provide a one-seat ride from North County to many key destinations for San Mateo County residents. The SFMTA also acknowledges the transit service SamTrans provides into San Francisco to complement transit connections between our two counties further.

BART is a critical piece of the transit network in San Mateo County, and San Mateo County riders are a key part of the BART system. BART carries approximately 25 percent of transit boardings among all operators in San Mateo County and ten percent of all day boardings for

BART originate in San Mateo County. On a typical weekday, BART runs 520 trains into and out of San Mateo County, providing 30 trains per hour before 7PM and averaging 25 trains per hour throughout the service day. Four out of five BART routes serve San Mateo County, providing quick and efficient access to key destinations such as downtown San Francisco, downtown Oakland, and UC Berkeley, among countless others.

In anticipation of the successful passage of a Transportation Revenue Measure in November 2026, which will dedicate revenues to support Bay Area transit agencies, including Muni, BART, Caltrain, and others, we want to reaffirm our commitment to this vital regional partnership. We also want to acknowledge the ongoing discussions around the revenue measure expenditure plan and accountability measures and express our good faith commitment to achieving mutually supportive solutions. With that, the SFMTA and BART are committed to the following today in support of our service to San Mateo County:

- **SFMTA Service Delivery in North San Mateo County:** The SFMTA agrees to exercise its power and authority over the schedules, service levels, and service standards to continue providing service to North San Mateo County in a manner consistent with the SFMTA's system-wide operating policies, subject to requisite analysis and approvals.
- **BART Service Delivery:** BART agrees to exercise its power and authority over schedules, service levels, and service standards to continue providing service to San Mateo County stations in a manner consistent with its system-wide scheduling and planning process.
- **Financial Transparency:** Both agencies commit to providing quarterly or biannual financial updates to the SamTrans General Manager to ensure ongoing transparency regarding our operations.
- **Service Change Consultation and Outreach:** Both agencies agree to present to the SMCTD Board of Directors any proposed substantive service changes that would impact service in San Mateo County. Furthermore, we commit to conducting proactive outreach to San Mateo County customers, in the impacted service areas, regarding such changes.
- **Adherence to SB 63 Requirements:** Both agencies agree to adhere to SB 63 requirements for Financial Transparency and Review and Regional Network Management Accountability. This includes:
 - Participating in a comprehensive independent third-party financial efficiency review.

- Finalizing an implementation plan that describes all efficiency measures our agencies plan to take.
- Complying with the maintenance of effort requirement.
- Complying with transit transformation policies and programs adopted through the Regional Network Management framework.

We also understand that the authors of SB 63 are continuing to develop additional language to ensure transit operator accountability and consistent treatment of all participating county entities in the regional measure. We are engaged in these discussions and look forward to their constructive resolution. In the interim, the above commitments underscore our dedication to continuing to provide a coordinated, effective, and accountable regional transit system.

We look forward to your feedback and any questions you may have about these proposed commitments. Thank you again for your invaluable partnership as we work towards a more connected and sustainable future for our region.

Sincerely,



Julie Kirschbaum

Director of Transportation
San Francisco Municipal
Transportation Agency



Robert M. Powers

General Manager
San Francisco Bay Area
Rapid Transit District

cc:

Board of Directors, San Mateo County Transit District (SMCTD)
Board of Directors, San Mateo County Transportation Authority (SMCTA)
Board of Directors, City/County Association of Governments of San Mateo County (C/CAG)
Board of Directors, San Francisco Municipal Transportation Agency
Board of Directors, San Francisco Bay Area Rapid Transit District
The Honorable Scott Wiener, California State Senate
The Honorable Jesse Arreguin, California State Senate
Andrew Fremier, Executive Director, Metropolitan Transportation Commission (MTC)



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August 1, 2025

Jeff Gee, Chair
SamTrans
1250 San Carlos Ave.
San Carlos, CA, 94070

RE: SB 63 (Weiner) Opt In Recommendation for SamTrans

Dear Chair Gee:

The City/County Association of Governments of San Mateo County (C/CAG) Board of Directors met on July 30, 2025 to discuss whether or not to recommend that the County opt-in to SB 63, the Regional Transportation Measure.

The C/CAG Board of Directors approved (18 ayes, 2 noes, and 1 abstention) the following motion:

To recommend opting in to SB 63 at a ½ cent, with a term of 14 years, based on the "SMCTD Alternative" Expenditure Plan attached for reference, with the following conditions:

1. Accountability for the full term of the measure (presented at meeting and based on Memo from Assemblymember Papan, which is attached for reference).
 - a) Creation of a 5-member Regional Measure Oversight Committee (ROC).
 - b) One Member each: SamTrans Board, SMCTA Board, C/CAG Board, County Board of Supervisors, San Mateo County Controller.
 - c) Regional Sales Tax for BART and MUNI shall be subject to performance based release contingent on compliance with oversight terms established by the ROC and identified in binding Interagency Agreements with BART and MUNI.
 - d) If performance obligations are not met, the ROC can withhold any or all funds.

- e) No disproportionate service cuts in San Mateo County by funded agencies, no additional surcharges or fees on San Mateo County riders.
 - f) Enforceable stations operations standards related to cleanliness, lighting, and public safety.
 - g) Work with local governments to facilitate commercial development and shared use at transit stations.
2. That SamTrans prepares:
- a) An expenditure plan for the return to source funding that looks at service and micromobility improvements; and
 - b) an outreach plan that obtains feedback from the Cities and public about the expenditure plan.

#

Before the motion, there was considerable discussion from both C/CAG Board Members and C/CAG Legislative Committee members about the need for quality and efficient transit throughout San Mateo County; strong accountability measures necessary to garner support of the electorate; and the expectation that the measure will improve and transform transit, and that transit operators are taking proactive steps towards sustainability to ensure that similar emergency measures are not required when the regional measure expires.

Please contact Sean Charpentier, C/CAG Executive Director, at scharpentier@smcgov.org if you have any questions.

Sincerely,



Adam Rak, Chair
City/County Association of Governments of San Mateo County

Enclosures:

SMCTD Alternative Expenditure Plan

Proposal for Local Oversight and Equity in Regional Transit Funding, Asm. Papan

cc:

SamTrans Board

SMCTA Board

Caltrain Board

SFMTA

BART

Assemblymember Papan

Assembly Member Berman

Assemblymember Stefani

State Senator Becker

State Senator Weiner

Andy Fremier, MTC

SMCTD Alternative: SB 63 Expenditure Plan

SMC Attributions by Agency

Recipient Agency	% of SMC ½ cent sales tax	Est. Annual San Mateo County Boardings	Today's dollars (FY 26) \$120M	FY 31 \$135M**
Caltrain*	24.07%	2.3M	\$28.89M	\$32.50M
BART	26.64%	3M+	\$31.97M	\$35.97M
Muni	5.1%	2.2M	\$6.10M	\$6.86M
SMCTD	38.95%	10M	\$46.74M	\$52.58M
MTC Transit Transformation	5.00%	N/A	\$6.00M	\$6.75M
Administration	0.25%	N/A	\$0.30M	\$0.34M

*Fully funds Caltrain deficit. Provisional number represents Caltrain JPB recommendation, pending SamTrans approval.

**HDL Revenue Generation Projection FY31



Protecting San Mateo County's Interest in Senate Bill 63 – Proposal for Local Oversight and Equity in Regional Transit Funding

Background

Senate Bill 63 proposes a **½-cent regional sales tax** to support public transit throughout the Bay Area, taxing five of the nine Bay Area Counties including Contra Costa, Alameda, San Francisco, San Mateo and Santa Clara counties with revenues to be distributed among several major transit operators.

While this regional approach to transit funding is contemplated to facilitate systemwide financial stability, it presents unique equity and governance challenges for San Mateo County.

Under the bill as drafted, San Mateo County would contribute substantial tax revenue to transit agencies based outside its jurisdiction—particularly the Bay Area Rapid Transit District (BART) and the San Francisco Municipal Railway (MUNI). San Mateo County lacks any representation, service parity, or operational oversight of these systems, nor does San Mateo County or locally governed transit agencies maintain any contractual service agreements or arrangements with either BART or MUNI that provide any such oversight or operational influence.

Both BART and MUNI provide limited service within the county as does the San Mateo County Transit District (SamTrans) provide limited service to both San Francisco and Santa Clara counties. These informal and traditional arrangements are both common and mutually beneficial between local jurisdictions and overlapping or adjacent transit services. Such overlapping services have never had any formal alignment or contractual basis however nor has funding ever been demanded or expected as part of these overlapping or connected services.

Under SB 63, San Mateo County residents will be taxed to directly subsidize such services, to the mutual benefit of riders from adjacent jurisdictions and the communities therein, yet SB 63 offers no reciprocal investment in San Mateo County transit services from those adjacent jurisdictions nor offers any accountability measures to protect the interests of both riders and taxpayers in San Mateo County.

The Need for San Mateo County Oversight in a Regional Framework

Regional investment must reflect both shared responsibility in maintaining a robust regional transit network as well as operational influence. Requiring San Mateo County taxpayers to

fund services directed by agencies beyond their democratic control—without any meaningful voice in operational decisions—sets a novel and perhaps detrimental precedent for regional collaboration.

In no other Bay Area transportation finance measure has a county been asked to contribute so substantially to out-of-county agencies without representation or reciprocal investment. Under prior bridge toll measures such as RM3, for example, revenue flows were determined and managed with defined return-to-source formulas or allocations governed by the Metropolitan Transportation Commission (MTC) with county input.

San Mateo County's Unique Position

San Mateo County is served by a constellation of regional systems (BART, Caltrain, MUNI, and SamTrans), yet has operational control only over SamTrans and shares control over Caltrain through the Peninsula Corridor Joint Powers Board.

Without safeguards, SB 63 would institutionalize a flow of tax revenue to external agencies with no binding agreement or oversight tool to deliver equitable service or improvements in return and to guarantee that such subsidies are expended on the operational and service needs of riders emanating from San Mateo County.

To safeguard local interests while still supporting the regional vision of SB 63, this memo outlines proposed amendments to ensure San Mateo County's contributions yield fair returns in service, limited oversight, and infrastructure investment.

Proposed Amendments: Oversight, Equity, and Accountability for San Mateo County

1. Creation of a San Mateo County Regional Measure Oversight Committee (ROC)

The **San Mateo County Regional Measure Oversight Committee (ROC)** shall provide governance, oversight, and enforcement of performance standards for transit services funded by the regional sales tax within San Mateo County. The ROC shall have authority over all funds allocated to BART and MUNI that are attributable to San Mateo County taxpayers.

ROC Membership

The ROC shall consist of the following five voting members:

- 1. Elected Member of the San Mateo County Transit District (SamTrans) Board**
(Excluding any member of the San Mateo County Board of Supervisors).

2. **Member of the City/County Association of Governments Board (C/CAG) of San Mateo County**
(Excluding any member of the San Mateo County Board of Supervisors).
 3. **Member of the San Mateo County Transportation Authority Board (SMCTA)**
(Excluding any member of the San Mateo County Board of Supervisors).
 4. **Member of the San Mateo County Board of Supervisors**
 5. **San Mateo County Controller**
-

2. Revenue Flow for San Mateo County (SMC)

- Regional sales tax revenue collected within San Mateo County and designated for **BART or MUNI** shall be subject to **performance-based release** as determined by the ROC.
 - No fixed portion of these funds shall be automatically transferred; instead, the **entirety** of San Mateo County's contributions to BART and MUNI shall be **conditionally disbursed** based on compliance with oversight terms established by the ROC.
-

3. ROC Responsibilities and Enforcement Authority

The ROC shall be responsible for negotiating, adopting, and enforcing binding **Interagency Agreements** with BART and MUNI that govern service and funding obligations related to San Mateo County. These agreements shall include provisions for:

- Minimum **service levels** within San Mateo County (including station coverage, headways, and span of service).
- **Station maintenance** standards, including cleanliness, lighting, safety, and amenities.
- **Fare structure coordination** across BART, MUNI, SamTrans, and Caltrain to ensure equity and accessibility.
- **Schedule integration** to optimize transfers between agencies serving San Mateo County riders.
- **Enforceable benchmarks** to achieve medium to long term sustainability.

Enforcement Mechanisms

If BART or MUNI fails to meet the performance obligations established in the Interagency Agreements, the ROC shall have the authority to:

- Issue formal notices of noncompliance, with defined timelines to cure deficiencies.
 - **Withhold any or all funds** otherwise designated for the noncompliant agency, without limitation, until full compliance is achieved.
 - Redirect unspent or withheld funds to **SamTrans projects** that benefit San Mateo County riders, upon conclusion of the regional measure's collection period.
-

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Because ridership and farebox recovery depend on timely, consistent, and coordinated service, the legislation must include enforceable **regional equity standards**:

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 - **MUNI Service Protections:** If MUNI receives funds for service in or out of San Mateo County, any cuts to San Mateo County routes must be no more severe than cuts elsewhere in the system during the lifespan of the tax.
 - **Schedule Coordination Mandate:** All participating agencies must coordinate timetables for transfers and connections, particularly at intermodal hubs, to optimize systemwide utility and ridership.
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-

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- Lighting and visibility
- Public safety

Failure to meet these standards will trigger:

- Financial penalties to the operator, OR
 - Reimbursement costs for corrective actions undertaken by SamTrans or local jurisdictions.
-

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To enhance the passenger experience and generate sustainable station revenue, operators shall:

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 - **Engage local economic development agencies** in long-term station area planning.
-

8. Sunset and Scope of the ROC

- The SamTrans ROC's authority shall apply only to SB 63's 2026 sales tax measure.
- The ROC shall sunset upon full expenditure of the measure's proceeds, unless extended by a future statute.

From: [Bill Hough](#)
To: [Public Comment](#)
Subject: public comment on agenda Item # 9.d.4.ii on August 6 Board agenda
Date: Saturday, August 2, 2025 8:32:02 AM

ATTENTION: This email came from an external source. Do not open attachments or click on links from unknown senders.

I oppose yet another sales tax increase.
We don't need another regressive transportation funding measure.
Our taxes are already too high.

Vote NO.

Why don't the wealthy high rollers at MTC suggest taxing rich tech companies and leave the little guy alone for a change? Why not a business tax?

Another regressive sales tax is a bad idea. All this nickel and diming contributes into making the Bay Area a horribly expensive place to live; especially for people of modest means, who must pay the greatest percentage of their income in these regressive taxes and fees. Each increase by itself does not amount to much, but the cumulative effect is to add to the unaffordability of the region.

Over the last several elections, voters have passed multiple regressive tax and fee increases.
Before increasing taxes YET AGAIN, waste needs to be removed from transportation projects.

Bill Hough

From: [Gregg Diequez](#)
To: [Public Comment; Board \(@samtrans.com\)](#)
Cc: [assemblymember.papan@assembly.ca.gov](#)
Subject: Comments on SB 63 - 8/6/25 agenda
Date: Monday, August 4, 2025 12:00:26 PM
Attachments: [SB63Opposition-SAMTRANS.pdf](#)

Some people who received this message don't often get email from mccgreggd@gmail.com. [Learn why this is important](#)

ATTENTION: This email came from an external source. Do not open attachments or click on links from unknown senders.

Attached are our comments on SB 63, which I believe is agenda item 9.d.4 on your Aug. 6, 2025 agenda.

Gregg A. Diéguez
Director of Sustainability - [SHIFT Bay Area](#)
Founder: MIT Club of Northern Calif. Energy & Environment Program
P.O. Box 370404
Montara, CA 94037
650-544-0714



August 3, 2025

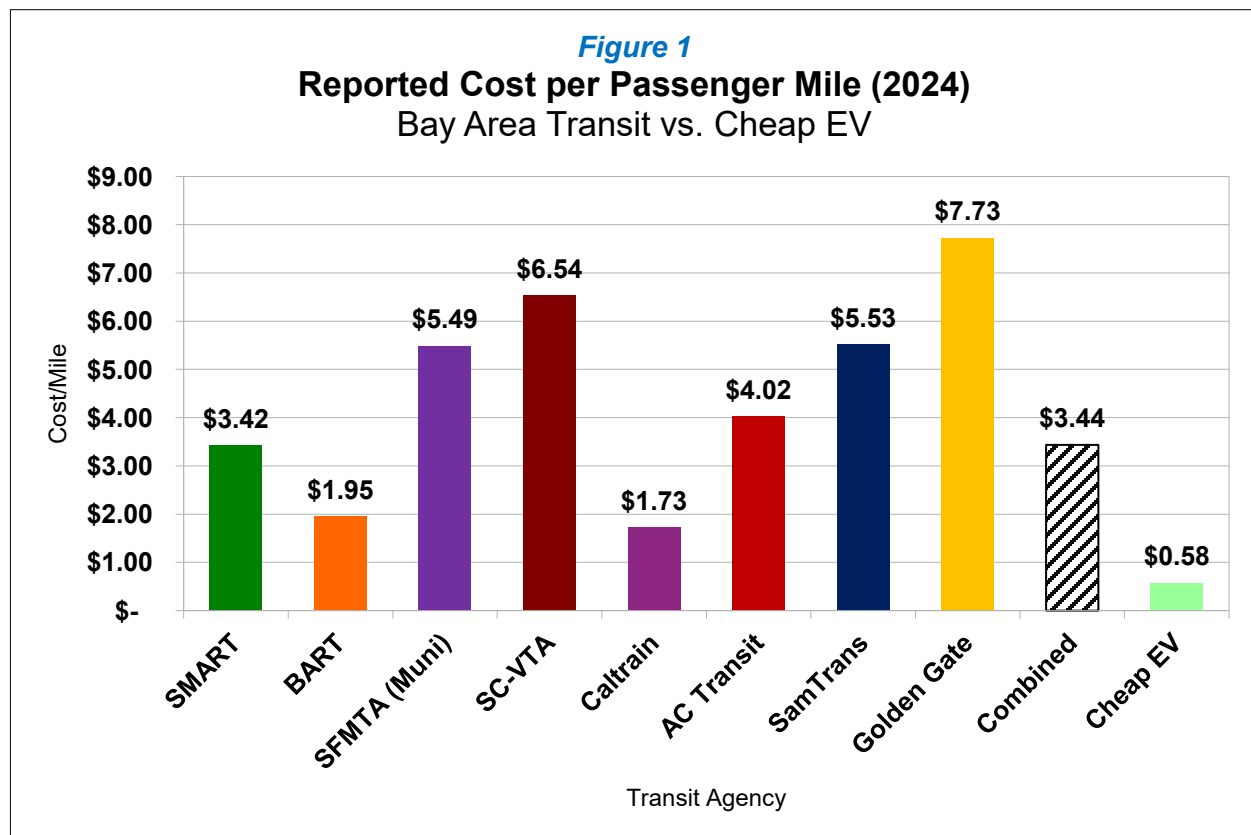
To: Board of Directors - SamTrans

Re: Senate Bill 63: San Mateo County Decision to Opt In or Out

Do not strap San Mateo County to the Traditional Transit Titanic. It is a sinking ship for good reasons that are not solved by this tax increase. Instead, push for efficiencies in the current bloated bureaucracies and for a transition to the emerging Agile and Affordable Transit Alternatives in mini-busses, ride-sharing and autonomous electric vehicles.

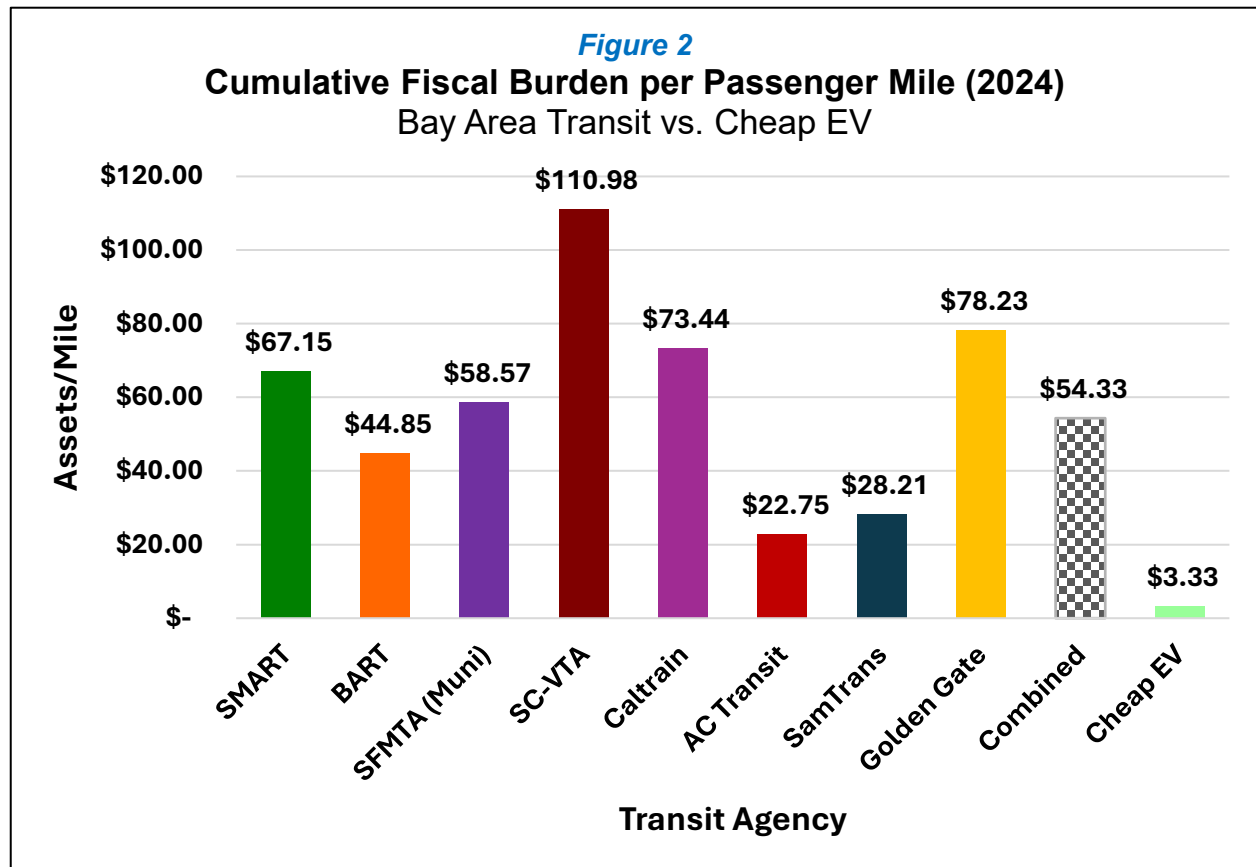
The Real Fiscal Issue: Inefficiency

What has not been presented by staff reports to local agency boards is the full context of Traditional Transit Cost (In)Efficiency in the Bay Area, including San Mateo County. A review of the 6/30/2024 financial performance of 8 major Bay Area Transit Agencies shows that they are massively inefficient compared to emerging alternatives. On average, Bay Area Transit services are 6 times more expensive than an EV, and do not deliver door to door service.

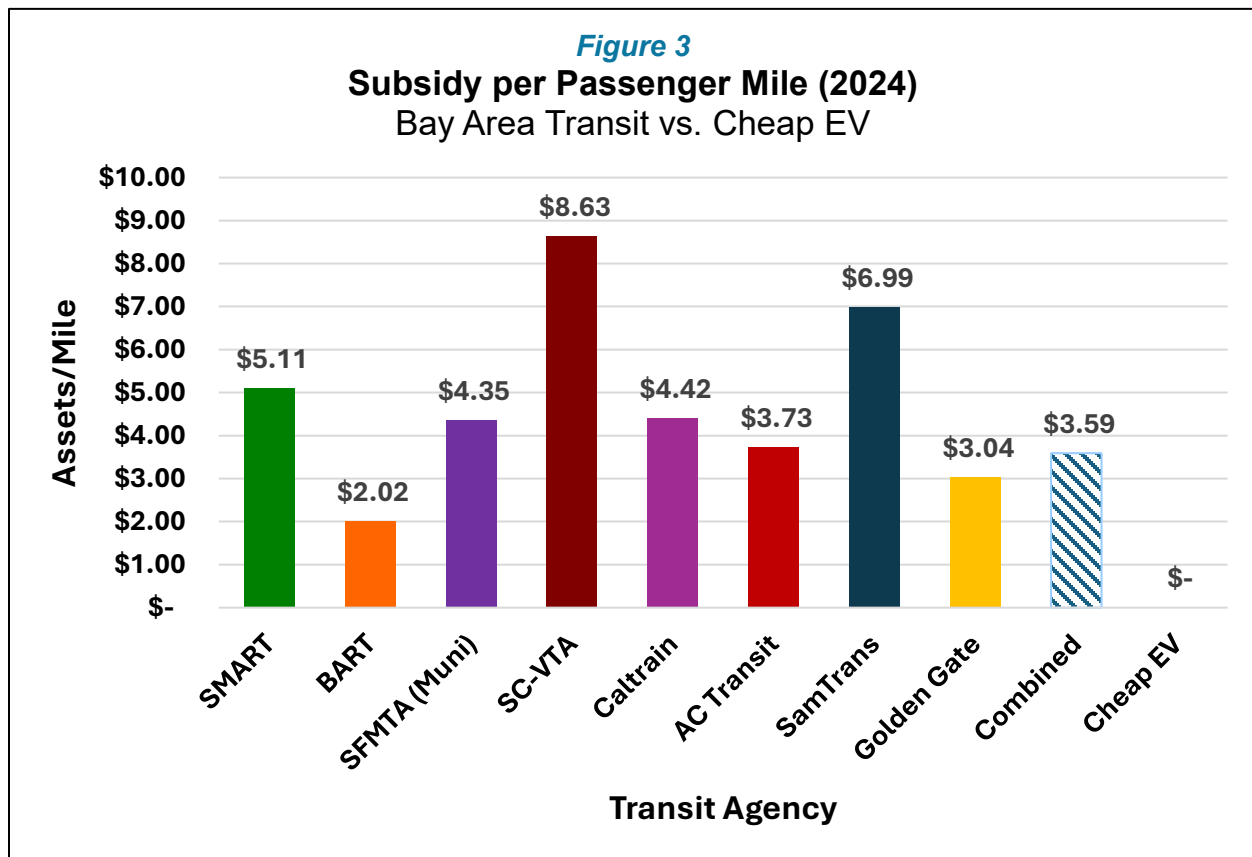


Even more striking is the massive inefficiency in capital asset utilization. The total Fiscal Burden per passenger mile, including capital assets requiring replenishment, unfunded retirement

benefits, and outstanding long-term debt is staggering in comparison to a cheap EV (*like my Chevy Bolt*). These costs would be even worse if bond funding is required, because a 30-year bond at today's rates adds about 100% to the cost of each asset financed. Even without considering the cost of financing, Bay Area Traditional Transit ties up over 16 times as much money in funds as a cheap EV.



Transit agencies receive some funds from passenger fares, advertising, parking and other sources which reduce their annual operating cost deficits. The rest of their funding comes from subsidies, both statutory taxes & fees as well as discretionary contributions from federal, state, and local sources. What is most instructive is to look at the total SUBSIDIES per passenger mile, the costs not offset by earned income, which are the costs borne by even NON-riders of transit services. Figure 3 shows those subsidies per passenger mile.



Note that for most of these agencies, the Subsidies EXCEED the reported operating costs, because of contributions for capital asset projects and other government assistance programs. Note that an owner-driven EV, or an autonomous EV service such as Waymo, involves no subsidies. San Jose Mayor Mahan has [proposed providing \\$20 ride share credits](#) in lieu of the VTA, because he understands how expensive Traditional Transit is. The challenge for the Bay Area is to move from the costly bars on the left of these charts and toward the far right bar, where the costs and risks are borne by those benefiting from the service - e.g. the vehicle owners or businesses benefitting from workers and customers.

We need to inaugurate cost-effective competition for these legacy bureaucracies, because at present they are not motivated to make themselves more efficient and are not delivering appropriate benefits for taxpayer funds.

San Mateo County faces a plethora of funding needs, especially with the Trump Administration pulling funding from many programs. Those needs include: education, health care, climate change mitigation and adaptation (e.g. stormwater and SLR), and more. It is time for our elected leaders to realize that Traditional Transit costs are out of control, and to move toward more modern solutions so that our scarce resources can be used to address other priorities.

Additional Reasons to Opt-OUT of SB 63:

1. The transit ridership loss is not Pandemic-related and temporary, it is a permanent and efficient shift to work from home and shop from home.
2. The projected transit ridership is unaccountable and optimistic. The deficits will be worse than projected and there is no accountability or recompense for failures to attain estimated financial performance.
3. SMC should not subsidize incompetent bureaucracies at BART and SFMTA with \$40M to \$60M annually of SMC taxpayer monies. Our County has its own pressing priorities. As constituted, SB 63 would send 42.5% of the taxes raised OUTSIDE THE COUNTY.
4. The SB 63 Accountability provisions are unknown, and likely toothless. Do not agree to anything until everything is specified; this is your only leverage.
5. The MTC is not competent to oversee accountability, in fact their own malfeasance has resulted in tens of millions of dollars in losses on Derivative investments, an inability to retain the BART inspector general, meaningless oversight, and deceptive BART accounting practices.
6. The deadlines foisted upon you are arbitrary, based on the desperation of the mis-managed BART and Muni agencies and San Francisco politicians.
7. There are no cost-saving measures proposed by any of the agencies involved. What there is in SB63, is an agreement to STUDY cost efficiencies... after 5 years have already elapsed with obvious ridership problems. This is management malfeasance of the highest order, and those involved in this failure cannot be allowed to continue in a supervisory or decision-making role; hence the MTC cannot oversee this effort. Also, the selection of a Select Committee to study transit costs cannot involve any current transit agency, though those agencies must support that study by providing staff time and requested information. Because of the strong vested interests in the Traditional Transit Establishment, it will take some thought on how to assemble a truly independent Study Committee which includes members from consulting firms not beholden to said Establishment, as well as from vendors providing the emerging transit alternatives.
8. Allowing any currently planned transit capital asset spending to proceed without a full review and financial justification is an abdication of fiduciary responsibility by the County and its transit governing bodies. All capital investment plans must be paused immediately pending findings from the Select Committee.
9. The delayed expenditures from item 8 can be used to fund the Select Committee Study until that study is completed, and then whatever funding is later agreed can reimburse for the Study costs.
10. This is only a “crisis” because of the failures of management at the agencies involved to address them sooner.
11. If an Opt-In is considered, require custody of the SMC tax funds at the County to be disbursed only when significant performance and oversight conditions are met. The lack of specificity on those terms must prevent passage of any Opt-In to SB 63 for now. Assembly Member Papan’s suggested amendments, and others, must be reviewed and debated in public before any decision. There must be no limit on the amount of SMC tax funds that can be withheld, because there is no limit on the potential breaches which could occur.
12. Businesses benefit from workers and customers (tourists); they should fund transit services accordingly.
13. San Mateo County residents already pay multiple transit/transportation sales taxes aggregating to 1.625% of each taxable transaction. SB 63 would push total sales tax rates

in much of San Mateo County over 10%. This is a regressive tax that falls hardest on lower income residents already struggling with the Bay Area's high cost of living, and should not be dismissed by assuming the benefit of continuing traditional transit will offset that. Many of those residents cannot use transit to get to and from work. In 2023, only 5.6% of SMC residents used public transportation to do so.

14. The top priority regarding Traditional Transit must be its transformation. However, the legislative history of SB 63 includes: *"...before passing, the author accepted Committee amendments that prioritize the operations of the San Francisco Bay Ferry (WETA) service and the East Bay bus systems over funding for transit transformation, while also reducing the transit transformation pot from 10 percent to 5 percent."* That is the exact WRONG priority. In fact, before any further funding is agreed, the transit transformation study should be completed. SB 63 must be changed to prioritize making fiscal sense before spending.

Reject SB 63: Opt OUT. The challenge for Bay Area Transit is to move from the cost and asset inefficiencies of the Traditional Transit Titanic and to instead support study and development of modern, agile and affordable transportation services which both reduce cost and provide door-to-door service, so people don't have to carry their groceries home in the rain.

Sincerely,

Gregg Dieguez
Director of Sustainability
SHIFT-Bay Area
www.shift-ba.org
mccgreggd@gmail.com

Note: The figures presented herein are my calculations based on ACFR's as of 6/30/24. The numbers are preliminary pending finalization of the National Transit Database statistics for 2024 (expected Q4, 2025) and peer review of a pending report containing these, and more, statistics.

CC: SMC BoS, SMCTA, C\CAG, Assy. Member Papan

From: [Bradley Dunn](#)
To: [Board \(@samtrans.com\)](#)
Cc: [April Chan](#); [Patrick Gilster](#)
Subject: BART / San Mateo County Next Generation Fare Gate Press Conference and Ribbon Cutting
Date: Friday, August 1, 2025 4:57:55 PM
Attachments: [image001.png](#)
[image002.png](#)
[SanBruno_NGFG_RibbonCutting_INVITE.pdf](#)

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Dear Samtrans partners,

You are cordially invited to attend the BART Next Generation Fare Gate Ribbon Cutting celebration and press conference at the San Bruno BART station on Thursday, August 21, 2025, at 11:00am.

BART is proud to finish the installation of Next Generation Fare Gate Installations at all San Mateo County BART stations. The taller and stronger fare gates enhance public safety and improve the rider experience with modern technology.



YOU ARE INVITED

**to a celebration of new fare gates
in all San Mateo County stations!**

Join BART and see for yourself the new look, state of the art technology, and improved experience.

San Mateo County BART Fare Gate Ribbon Cutting

Thursday, August 21, 2025, at 11:00am

San Bruno BART Station

1151 Huntington Avenue, San Bruno



Let's go.

Details:

Event: BART San Mateo County Next Generation Fare Gate Ribbon Cutting and Press Conference

When: Thursday, August 21, at 11:00am

Where: San Bruno BART Station, 1151 Huntington Avenue, San Bruno, CA 94066

Please let me know if you can attend. We look forward to seeing you there as we celebrate this important milestone for public transit in San Mateo County.

Sincerely,

Bradley Dunn

Manager of Local Government and Community Relations

San Francisco Bay Area Rapid Transit District (BART)

2150 Webster Street, 10th Floor, Oakland, CA 94612

Phone: (510) 464-6211 | Cell: (510) 406-2987

Email: bradley.dunn@bart.gov





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Let's go.