



**JOINT MEETING OF THE BOARD OF DIRECTORS
FOR THE
SAN JOAQUIN COUNCIL OF GOVERNMENTS, SJCOG, INC.
AND SAN JOAQUIN REGIONAL HOUSING FUND, INC.**

555 E. Weber Avenue, Stockton, CA 95202
Board Conference Room

Thursday, March 26, 2026

REGULAR BOARD MEETING AT 4 PM

Members of the public may also watch the meeting on YouTube by accessing the following link. Please be advised that this option is for viewing only and does not offer a means to participate in the meeting.

Live stream of the Board of Directors meeting at:

<https://www.youtube.com/sjcogvideo/live>

The San Joaquin Council of Governments is in compliance with the Americans with Disabilities Act of 1990 (42 U.S.C. # 12132) and the Ralph Brown Act (California Government Code # 54954.2) and will make all reasonable accommodations for the disabled to participate in employment, programs, and facilities. Person requiring assistance or auxiliary aid in order to participate or persons wishing to store their bicycle safely during the meeting should contact Vanessa Gallegos, Office Administrator at (209) 235-0600 at least 24 hours prior to the meeting. NOTE: Items identified with *SJCOG, Inc. are actions of SJCOG, Inc. acting as the designee of SJCOG pursuant to the San Joaquin County Habitat Conservation Plan for the acquisition, holding, administering, and managing real property pursuant to that plan. Items identified as SJRHF, Inc. are actions of the San Joaquin Council of Governments, acting in its capacity as Sole Corporate Member of the San Joaquin Regional Housing Fund, Inc.

AGENDA

1. **CALL TO ORDER / PLEDGE OF ALLEGIANCE / ROLL CALL:**
2. **RECOGNITIONS/PRESENTATIONS:** None.
3. **PUBLIC COMMENTS:**

At this time, the public is invited to address the Board on any non-agendized item that is within the subject matter of this agency. There is a three-minute maximum time limit. The determination of whether an item is within the subject matter and jurisdiction of the Council is a discretionary decision to be made by the Chair of the Council. If several speakers are

commenting on the same issue, they should try to avoid repetition of views already expressed.

4. **CONSENT CALENDAR:** All numbered consent calendar items listed will be acted upon under one vote unless specifically removed from the consent calendar by a member of the Board, a member of staff, or a member of the public. These are the items:
 - A. Approve the February 26, 2026 minutes from the Joint meeting of the Board of Directors for the SJCOG, SJCOG, Inc., and San Joaquin Regional Housing Fund Inc.
 - B. *SJCOG* — Approve the Fiscal Year 2026-27 State of Good Repair Distribution Methodology and Revenue Estimates (Joel Campos)
 - C. *SJCOG* — Adoption of the Proposed Final Fiscal Year 2026-27 Overall Work Program (Kim Anderson/Grace Orosco)
 - D. *SJCOG* — Approval of the Fiscal Year 2026-27 Proposed Annual Financial Plan (Grace Orosco)
 - E. *SJCOG* — Approve Fiscal Year 2025-26 Overall Work Program Amendment No. 4 (Rosie Zeiter)
 - F. *SJCOG* — Award Contract for Construction of the Tracy Transit Station Mobility Hub Improvements Project (Ann Herner)
 - G. *SJRHF, Inc.* — Approve Additional Technical Member Appointments for the San Joaquin Regional Housing Fund Inc. Advisory Committee (Joann Martinez)
 - H. *SJRHF, Inc.* — Approval of San Joaquin Regional Housing Fund Inc. Draft Project Scoring Criteria (Christine Corrales)
 - I. *SJCOG, Inc.* — Approval of the SJ River Club Monopole Project Plan Participation (Laurel Boyd)
 - J. *SJCOG, Inc.* — Approval of the Dry Creek Road Bridge Rehabilitation Project, Plan Participation and Habitat Classification Change (Laurel Boyd)
 - K. *SJCOG, Inc.* — 2025 San Joaquin Multi-Species Habitat Conservation and Open Spaces Plan Annual Report Release (Steve Mayo)

5. **ACTION ITEMS:**
 - A. *SJCOG* — Approval of Senate Bill 125 Phase 2 Programming Recommendations (Joel Campos)
 - B. *SJCOG* — Approval of the 2026 One Voice® Program of Projects and Updated Federal Legislative Platform and Receive Verbal Report from Eric Lausten, HBS (Joel Campos)
 - C. *SJCOG, Inc.* — Public Hearing for Cerri Undine Road Preserve Acquisition (Steve Mayo)

6. **DISCUSSION ITEMS:** None.

7. **INFORMATION ITEMS:**
 - A. *SJCOG* — Receive Feedback on Regional Active Transportation Program Cycle 8 Regional Program (Joel Campos)
 - B. *SJCOG* — Notify Partners of Federal Transit Administration 5310 Call for Projects Results (Joel Campos)

C. SJCOG — Announcement of Artificial Intelligence and the Future of Jobs - San Joaquin Council of Governments and the Center for Business and Policy Research Speaker Series Event (Isaiah Anderson)

8. **CHAIR REPORT:** Chair Christina Fugazi
9. **BOARD MEMBERS' REPORT:**
10. **EX OFFICIO BOARD MEMBERS' REPORT:**
- A. Port of Stockton (Margaret Stephens)
 - B. San Joaquin Regional Transit District (Derek Graves)
 - C. Caltrans District 10 (Grace Magsayo)
11. **EXECUTIVE DIRECTOR'S REPORT:** Diane Nguyen
12. **ADJOURNMENT:** Chair Christina Fugazi

Meeting adjourned to Thursday, April 23, 2026 at 4 p.m., SJCOG Conference Room.

NOTE:

Prior to the meetings, SJCOG provides access to the agenda packet online at <https://www.sjcog.org/AgendaCenter/Board-of-Directors-1>. Copies are available for public inspection at the SJCOG office located at 555 E. Weber Ave, Stockton, CA, copies will be available at the meeting.

“SJCOG fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to file a Title VI related complaint see <http://www.sjcog.org> or call (209) 235-0600.”

AGENDA ITEM **4A**



JOINT MEETING OF THE BOARD OF DIRECTORS FOR THE
SAN JOAQUIN COUNCIL OF GOVERNMENTS, SJCOG INC. AND SAN JOAQUIN
REGIONAL HOUSING FUND INC.

SJCOG Board Room
555 E. Weber Ave.
Stockton, CA 95202

February 26, 2026

REGULAR BOARD MEETING AT 4 P.M.

MINUTES

1. The board meeting was called to order at 4 p.m. by Chair Christina Fugazi.

Roll Call:

Board Members Present:

Mayor Paul Akinjo, City of Lathrop; Councilmember Dan Arriola, City of Tracy; Councilmember Lisa Craig-Hensley, City of Lodi; Supervisor Sonny Dhaliwal, San Joaquin County; Supervisor Steve Ding, San Joaquin County; Councilmember Jeremy Engle, City of Escalon; Mayor Christina Fugazi, City of Stockton; Councilmember Dan Harrison, City of Mountain House; Councilmember Mariela Ponce, City of Stockton; Supervisor Robert Rickman, San Joaquin County; Mayor Gary Singh, City of Manteca; Councilmember Leo Zuber, City of Ripon.

Board Members Not Present:

Councilmember Mario Enriquez, City of Stockton.

Ex Officio Members Present:

Derek Graves, San Joaquin Regional Transit District; Grace Magsayo, Caltrans; Margaret Stephens, Port of Stockton.

Staff Members Present:

Diane Nguyen, Executive Director; Ryan Niblock, Deputy Director of Programming and Delivery; Kim Anderson, Deputy Director of Planning; Grace Orosco, Deputy Director of Finance and Administration; Steve Mayo, Program Manager; Lynnetta Castle, Manager of Finance; Joel Campos, Senior Regional Planner; Travis Yokoyama, Senior Regional Planner; Edith Verdin, Senior Regional Planner; Keith Michaud, Communications Journalist; Melissa Ablang, Assistant Program Specialist; Laurel Boyd, Associate Habitat Planner; Christine Corrales, Manager of Planning; Rosie Zeiter, Accounting Assistant II; Isaiah Anderson, Associate Regional Planner; Raul Tovar, Assistant Regional Planner; Janicia Thedmada, Assistant Regional Planner; Jacob Williams, Assistant Regional Planner; Alvaro Gambino, Assistant Regional Planner; Leah Fong, CivicSpark Fellow; Aaron Lowe, CivicSpark Fellow; Winston Zheng, CivicSpark Fellow; Vik Sharma, IT Manager; Vanessa Gallegos, Office Administrator; Lisa Ly, Administrative Technician; Breanna Guzman, Administrative Clerk II; Andy Pinasco, Counsel.

2. **Recognitions/Presentations:** None.

3. **Public Comments:**
Counsel said there was a written comment on a non agendized item in the Board members blue folder.

4. **Consent Calendar Items:**
 - A. Approval of the January 22, 2026 minutes from the joint meeting of the Board of Directors for the SJCOG, SJCOG Inc., and San Joaquin Regional Housing Fund Inc.
 - B. *SJCOG* — Approval of Fiscal Year 2026-27 Unmet Transit Need Comment Review Subcommittee’s Recommendation
 - C. *SJCOG* — Approve Fiscal Year 2025-26 Transportation Development Act Claim from the City of Stockton
 - D. *SJCOG* — Adopt the Fiscal Year 2026-27 Local Transportation Fund Revenue Estimate and Apportionment Schedule
 - E. *SJCOG* — Adopt Fiscal Year 2026-27 State Transit Assistance Apportionment Schedule
 - F. *SJCOG* — Approve Fiscal Year 2024-25 Transportation Development Act Claim from the City of Manteca
 - G. *SJCOG* — Adopt the 2025 Regional Congestion Management Program Monitoring Report
 - H. *SJCOG* — Award Contract for technical and Analytical Services for Regional Congestion Management Program Fiscal Year 2026-29
 - I. *SJCOG* — Approve Citizens Advisory Council Bylaws Revisions
 - J. *SJCOG* — Approve Executive Committee Recommendation to Fill Vacancy on the San Joaquin Regional Rail Commission
 - K. *SJCOG* — Approval of Fiscal Year 20256-26 Low Carbon Transit Operations Program Distribution Methodology
 - L. *SJCOG* — Fiscal Year 2024-25 Measure K Annual Report
 - M. *SJRHF, Inc.* — Approve San Joaquin Regional Housing Fund Advisory Committee Technical Advisor and Discuss Future Appointments
 - N. *SJRHF, Inc.* — Approve Amendment to Advisory Committee Members and Alternates Procedures
 - O. *SJCOG, Inc.* — Approve the Van Buskirk Park Renovations Project, Buffer Reduction
 - P. *SJCOG, Inc.* — Approve the Forward Landfill, North Bridge Project, Plan Participation and Buffer Reduction
 - Q. *SJCOG, Inc.* — Approve the State Route 99 Frontage Road Truck Parking Project, Plan Participation and Habitat Classification Change
 - R. *SJCOG, Inc.* — Approve the City of Lodi Police Training Facility Project, Plan Participation and Buffer Reduction
 - S. *SJCOG, Inc.* — Approve the S-Line Transportation Truck Parking and Repair Project Plan Participation

Boardmember Lisa Craig-Hensley pulled item 4I, 4J, 4L and 4R for comment.

It was moved/seconded (Zuber/Arriola) to approve the consent calendar without items 4I, 4J, 4L and 4R. The motion passed (11/0) by electronic vote.

Boardmember Gary Singh arrived during this time.

Boardmember Craig-Hensley made remarks on the Citizens Advisory Committee (CAC) Bylaws, the San Joaquin Regional Rail Commission (SJRRRC) appointment of Supervisor Paul Canepa and suggested a Measure K informational presentation in the future.

It was moved/seconded (Zuber/Craig) to approve items 4I, 4J, 4L and 4R from the consent calendar. The motion passed (12/0) by electronic vote.

5. **Action Items:**

A. *SJCOG* — Approval to Release the Draft Fiscal Year 2026-27 Overall Work Program

Grace Orosco said the estimated net revenues are \$47.3 million, which represents a \$9.7 million decrease from the previous year due primarily to the planned spending and closeout of several large multi-year grants. San Joaquin Council of Governments (SJCOG) staff Kim Anderson and Ryan Niblock provided additional information on the budget. Boardmember Paul Akinjo asked for further detail and Director Diane Nguyen explained that capital project delivery, such as SR 99/120, would be completed in this current fiscal year.

Ex Officio Derek Graves arrived during this presentation.

It was moved/seconded (Zuber/Arriola) to approve the Draft Fiscal Year 2026-27 OWP. The motion passed unanimously (12/0) by electronic vote.

6. **Discussion Items:**

A. *SJCOG* — Draft 2026 One Voice® Program of Projects and Federal Legislative Platform

Joel Campos gave an overview of the draft 2026 One Voice federal advocacy program, which identifies regional priorities for federal funding.

Boadmembes asked how the region's approach to federal advocacy may need to adapt under a new federal administration and what were some takeaways from last year to enhance advocacy. Mr. Campos said that while priorities at the federal level may shift, the region has already adjusted its project messaging and framing based on feedback from prior advocacy trips. Mr. Campos noted that agencies are now better aligning their applications with federal priorities, which should help maintain competitiveness for funding.

This item was for discussion only.

B. *SJCOG* — Review of 2026 Regional Transportation Plan/Sustainable Communities Strategy Framework for Draft Plan Development

Edith Verdin said planning framework for the next Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS). Ms. Verdin said the framework includes updated revenue projections, a revised regional project list, updated policy strategies, and land-use scenarios developed through public outreach and technical analysis.

Boardmembers asked how the RTP/SCS framework translates into tangible actions for cities and the county. Ms. Verdin explained that inclusion in the regional project list is critical, as it makes projects eligible for state and federal funding. The plan helps guide priorities and informs future funding decisions, though projects must still return to the board for final funding approval.

This item was for discussion only.

7. **Information Items:**

A. *SJCOG* — 2026 Measure K Ordinance and Expenditure Plan Amendment Process

Boardmember Craig-Hensley asked for a presentation. Ryan Niblock said the annual process of the Measure K Expenditure Plan allows jurisdictions and stakeholders to request updates to the list of eligible projects or make minor adjustments to project descriptions. Mr. Niblock said the amendment process allows the program to adapt to changing regional needs since the measure was originally approved by voters. Requests for amendments must be submitted by March 27, 2026, and any proposed changes will return to the board for review and consideration. Director Nguyen added that any amendments, such as adding a new project, would result in a concurrent amendment to the Measure K Strategic Plan.

This item was information only.

8. **Chair's Report:**

Chair Fugazi shared a regional update regarding the Woodward Avenue and Moffat Boulevard crossing in the City of Manteca. She announced that the crossing is now fully open. Boardmember Singh thanked SJCOG for working with the City of Manteca on a temporary measure to open the intersection during construction.

Board Members' Report:

Boardmember Craig Hensley provided an update of the SJRRC activities, including the special train to the Super Bowl and passenger appreciation events.

9. **Ex Officio Board Members' Report:**

A. **Port of Stockton**

Margaret Stephens said construction of a 650,000-square-foot Home Depot distribution center is underway and expected to be completed by mid-September. Ms. Stephens said Congressman Josh Harder recently visited the port for a roundtable discussion on federal transportation policy.

B. **San Joaquin Regional Transit District**

Derek Graves introduced himself and shared updates, including the appointment of Kimberly Turner as Interim CEO and the addition of two new board members, with two vacancies remaining. Mr. Graves said RTD's priorities include improving ridership, strengthening planning efforts, and enhancing regional partnerships.

C. **Caltrans District 10**

Grace Magsayo provided updates on a new state safety initiative targeting excessive speeding, organizational changes to strengthen transit and rail programs, and several regional construction projects, including work on I-580 in Tracy, SR-4 at the Old River Bridge, and I-5 pavement rehabilitation in Stockton.

10. Executive Director's Report:

Director Nguyen welcomed the new RTD Board Chair, Derek Graves, and interim CEO Kimberly Turner. Ms. Nguyen reported that SJCOG staff are working with regional and statewide partners on potential modernization of SB 375 requirements related to greenhouse gas reduction and regional planning. Ms. Nguyen said that Community Project Funding opportunities have opened through congressional offices, and SJCOG plans to submit requests for the SR-99/120 Phase 1B project and the I-205 Managed Lanes project.

12. ADJOURNMENT:

The meeting was adjourned at 4:58 p.m. The next meeting will be at 4 p.m. Thursday, March 26, 2026 in the SJCOG Conference Room.

AGENDA ITEM **4B**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Approve the Fiscal Year 2026-27 State of Good Repair Distribution Methodology and Revenue Estimates

RECOMMENDED ACTION: Recommend Approval of the Fiscal Year 2026-27 State of Good Repair Distribution Methodology and Revenue Estimates

DISCUSSION:

Established by Senate Bill 1, the State of Good Repair (SGR) Program provides \$105 million per year to eligible recipients for transit repair, rehabilitation, and capital projects that keep public transit system in a state of good repair. An initial estimate of \$1,435,406.00 in section 99313 funds has been awarded to San Joaquin County for dispersal by the San Joaquin Council of Governments (SJCOG) for FY 2026-27. By midyear, if the estimates appear lower or higher, SJCOG will amend the apportionments using the approved approach and will recirculate the updated allocations to the transit operators. Eligible SGR projects include:

- Transit capital projects or services to maintain or repair a transit operator's transit vehicle fleet or transit facilities;
- The design, acquisition, and construction of new vehicles or facilities that improve existing transit service; and
- Transit services that complement local efforts for repair and improvement of local transportation infrastructure.

In prior years, Section 99313 SGR funds have been split in a manner that mirrors the way Local Transportation Funds (LTF) are apportioned. Specifically:

- SJRRC would receive 11.5 percent; and
- Remaining funds would be distributed between transit providers based on population share.

The initial estimated apportionment, based on the recommended methodology, is summarized in Table 1. Table 1 also displays estimates for section 99314 funds. These funds are provided directly to the transit operators through the SGR program from the State Controller's Office (SCO). 99314 funds are already split by the SCO and are

displayed in Table 1 for information purposes only. SJCOG has no control as to how the 99314 funds are allocated.

Table 1: Revenue Estimates (both 99313 and 99314) Based on 2025 CA Department of Finance Population Estimates

Agency/Jurisdiction	Population	Percentage Share	99313 Estimate	99314 Estimate
SJRRC**		11.50%	\$165,072	\$177,739
RTD*	485,234	53.29%	\$764,913	\$125,415
Lathrop	38,596	4.24%	\$60,842	\$0
Lodi	67,093	7.37%	\$105,764	\$10,963
Manteca	93,733	10.29%	\$147,759	\$961
Tracy	98,215	10.79%	\$154,824	\$2,402
Ripon	15,753	1.73%	\$24,833	\$548
Escalon	7,232	0.79%	\$11,400	\$641
Mountain House		0.00%	\$0	\$0
TOTAL	805,856	100%	\$1,435,406	\$318,669

*RTD Population = Stockton + Unincorporated County + Mountain House

**Under LTF, SJRRC receives 11.5% of funds and is not included in the population distribution.

RECOMMENDATION:

Recommend the SJCOG Board approve the FY 2026-27 state of good repair distribution methodology and revenue estimates.

COMMITTEE ACTIONS:

Interagency Transit Committee: Unanimously approved.

Technical Advisory Committee: Unanimously approved.

FISCAL IMPACT:

None at this time.

Prepared by: Joel Campos, Senior Regional Planner

AGENDA ITEM **4C**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Adoption of the Proposed Final Fiscal Year 2026-27 Overall Work Program

RECOMMENDED ACTION: Adopt Resolution 2026-21, approving the Proposed Final Fiscal Year 2026-27 Overall Work Program

SUMMARY:



In February, San Joaquin Council of Governments (SJCOG) staff provided standing committees and the Board with a presentation of the draft Fiscal Year 2026-27 Overall Work Program (OWP). The SJCOG Board approved the draft document for release to state and federal agencies for review and comment. The comment period was open until March 13, 2026. One comment letter was received from Caltrans during the comment period. SJCOG staff has responded to all comments in the letter and has updated the OWP narrative in the proposed final document as needed or requested. None of the comments resulted in changes to the revenue identified for the coming fiscal year.

The proposed final OWP document for Fiscal Year 2026-27 will be available at this location by March 23, 2026: <https://www.sjcog.org/163/Overall-Work-Program-Annual-Financial-Pl>.

RECOMMENDATION:

Approval of the Proposed Final Fiscal Year 2026-27 OWP by adoption of resolution 2026-21.

FISCAL IMPACT:

Approval of the proposed final OWP identifies \$47,315,919 in revenue for SJCOG operations in Fiscal Year 2026-27. This is a decrease of \$9,797,999 from the Fiscal Year 2025-26 amended OWP (amendment 3 adopted December 2025). The decrease is due to the expected spending down and closing out of several large grants.

- Substantial spend-down of federal funding on the I-205 Managed Lanes Widening project.
- Significant spend-down of state REAP 2.0 funds for locally delivered projects, as well as key deliverables for the Mobility Hubs Project
- Delivery of one of SJCOG's highest priority infrastructure projects, the State Route 99/120 Connector project, will be substantially complete in Fiscal Year 2025-26

The OWP is typically amended several times during the year to reflect changes in revenue estimates, new revenue received, or the addition or deletion of awarded grant funding.

BACKGROUND:

The OWP is a management tool identifying the tasks and products that SJCOG will undertake to deliver during Fiscal Year 2026-27. It also identifies the funding sources and staff resources necessary to complete the overall work program.

The work program is broken down into work elements that are unique to specific subject areas. For example, one work element is dedicated to the preparation and update of the Regional Transportation Plan (RTP), which will see a significant level of effort in the first half of the fiscal year, with the delivery of the 2026 RTP expected in late summer. Each work element:

- Identifies work previously completed under that work element,
- The purpose of that work element and its subject matter,
- Tasks to be undertaken,
- A listing of products and the schedule for delivery of those products,
- The funding sources for each work element,
- The responsible agency,
- And the level of effort (staff allocation) required to undertake and deliver those tasks and products.

The continued focus in the coming fiscal year will be on studies, programs, and projects that will set the San Joaquin region on a course to be "shovel-ready" for funding that may be made available in the coming year. While a new federal transportation authorization is expected – the timing of this remains unclear. On the state level, the May budget revision often brings program funding revisions owing to decreases in state revenue collections. These state and federal uncertainties may mean further realignment of funding requests and affected programs to meet both state and federal priorities as these continue to evolve.

A more robust list of expected new and continuing activities was included in the February staff report and is outlined in detail in the full OWP document linked at the beginning of the staff report.

COMMITTEE ACTIONS:

- **Technical Advisory Committee** — Unanimously approved the staff recommendation.
- **Management and Finance Committee** — Unanimously approved the staff recommendation.
- **Executive Committee** — Unanimously approved the staff recommendation.

SCHEDULE AND NEXT STEPS

Should the SJCOG Board approve the Final Fiscal Year 2026-27 OWP, the full OWP package will be submitted to Caltrans by the due date of May 8, 2026

- The comment matrix with agency comments/response section completed acknowledging Caltrans comments on the draft OWP. The response needs to demonstrate where Caltrans comments were addressed with the Final OWP.
- Electronically signed Overall Work Program Agreement (OWPA)
- Budget Revenue Summary (BRS)
- Board Resolution approving the OWP
- Electronically signed Certifications and Assurances
- Final OWP and Appendices

ATTACHMENTS:

Resolution 2026-21

Prepared by: Kim Anderson, Deputy Director, Planning, and Gracie Orosco, Deputy Director of Finance and Administration.



RESOLUTION
SAN JOAQUIN COUNCIL OF GOVERNMENTS

R-2026-21

RESOLUTION APPROVING THE ADOPTION OF THE
FISCAL YEAR 2026-2027
OVERALL WORK PROGRAM
FOR THE SAN JOAQUIN COUNCIL OF GOVERNMENTS

WHEREAS, annually the San Joaquin Council of Governments acting as the Metropolitan Planning Agency, and the Regional Transportation Planning Agency for San Joaquin County adopts an Overall Work Program, and

WHEREAS, that Overall Work Program identifies the funding sources that the agency will utilize in the coming year, and the work tasks and products that the agency will produce, and

WHEREAS, this Overall Work Program must be submitted to the required funding agencies for their review and approval, and

WHEREAS, the Council of Governments must assure that the planning tasks identified are in compliance with all State and Federal laws and regulations, and are coordinated with all effected agencies, and communities on a regional basis, and

NOW THEREFORE BE IT RESOLVED that the San Joaquin Council of Governments adopts the attached 2026-2027 Overall Work Program and self-certifies the following:

The San Joaquin Council of Governments hereby certifies that the transportation planning process is addressing the major issues in the metropolitan planning area and is being conducted in accordance with all applicable requirements of:

- I. 23 U.S.C. 134 and 135, 49 U.S.C. 5303 through 5306 and 5323(1); as amended by the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users;
- II. Sections 174 and 176 (c) and (d) of the Clean Air Act as amended (42 U.S.C. 7504, 7506 (c) and (d))
- III. Title VI of the Civil Rights Act of 1964 and the Title VI Assurance executed by California under 23 U.S.C. 324 and 29 U.S.C. 794;
- IV. Section 1101(b) of the Transportation Equity Act for the 21st Century (Pub. L. 105-178 112 Stat. 107) regarding the involvement of disadvantaged business enterprises in the FHWA and FTA funded projects (FR Vol. 64 No. 21, 49 CFR part 26); and,

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Resolution #R-2026-21

- V. The provision of the Americans with Disabilities Act of 1990 (Pub. L. 101-336, 104 Stat 327, as amended) and the U.S. DOT implementing regulations (49 CFR 27, 37 and 38).

BE IT FURTHER RESOLVED, that the Executive Director of the San Joaquin Council of Governments be, and is hereby, authorized and empowered to execute in the name of the San Joaquin Council of Governments all necessary applications, contracts and agreements thereto implement and carry out the purposes specified in this Resolution, and

PASSED AND ADOPTED this 26th day of March 2026, by the following vote of the San Joaquin Council of Governments, to wit:

AYES:

NOES:

ABSENT:

Christina Fugazi, Chair

AGENDA ITEM **4D**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Approval of the Fiscal Year 2026-27
Proposed Final Annual Financial Plan

RECOMMENDED ACTION: Adopt Resolution 2026-22, approving
the Fiscal Year 2026-27 Proposed Final
Annual Financial Plan

The attached proposed Annual Financial Plan (AFP) provides a detailed summary of revenues and expenditures by cost category and line item. The proposal compares the Fiscal Year 2026-27 proposed budget with the most recently adopted Fiscal Year 2025-26 AFP. In addition, it compares the proposal to the Fiscal Year 2024-25 actual expenditures. The total revenues and expenditures amount to **\$47,315,919**. The proposed AFP represents the general fund budget for the San Joaquin Council of Governments (SJCOG). The revenues and expenditures in the AFP are the same as the Overall Work Program (OWP), however, presented in a traditional line-item format compared to the work element format of the OWP.

Below is a summary of revenues and expenditures in the AFP. For details on each of those categories please refer to the attachment.

Readers should note several differences between SJCOG and its member agencies' budgets:

- SJCOG revenue sources are quite different from our member agencies.
- SJCOG employs staff on an at-will basis, as compared to civil service for most member jurisdictions, and has its own employee handbook and policies.
- SJCOG has its own Financial and Accounting Policy guiding our financial matters including procurement procedures.
- SJCOG employees are exempted from Social Security except for Medicare.
- As noted below, SJCOG offers a defined contribution retirement plan to its employees. SJCOG has no CalPERS or other post-employment benefit obligations except limited sick leave conversion as noted for qualifying employees.

Upon adoption by the board, pursuant to the SJCOG Joint Powers Agreement, the AFP will be sent to the member agencies for ratification. Ratification is achieved when a majority of the member agencies, representing 55% of the county's population, approve the AFP.

The following assumptions are incorporated in the budget:

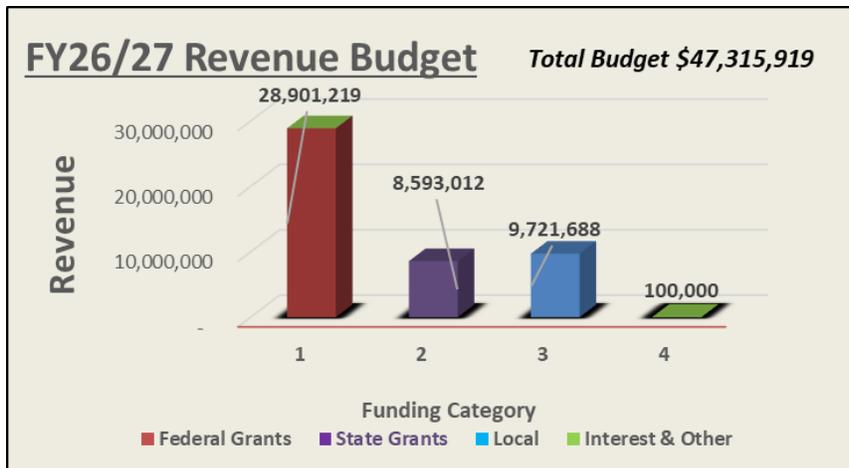
1. The budget includes a longevity incentive program to attract and maintain an experienced and knowledgeable workforce. The incentive is structured to recognize and reward the length of staff's tenure. The longevity pay targets will be 10, 15 and 20 years (of continuous service), with an increase in base salary of 1%, 2% and 3% respectively.

This longevity pay does not apply to the contract position of the Executive Director.

2. The budget includes a COLA adjustment of 2.67 percent in the minimum and maximum salary ranges of all classifications for noncontract positions. The COLA percent is applied to noncontract employees' salary.
3. SJCOG has no significant liability exposure for post-employment benefits.
 - a. The employee retirement program is a defined contribution program managed by Mission Square Retirement, formerly the International City Managers Association Retirement Program, with contributions defined within the Board adopted Policy Handbook
 - b. SJCOG employee vacation accruals are capped at two times the individual's annual leave, per the Board adopted Policy Handbook.
 - c. Upon separation, an employee can convert accrued sick leave hours to be deposited into a Retirement Health Savings Account to pay for health-related expenses, with the qualification being 50 years of age or 20 years of SJCOG employment. The conversion is based upon the employee's salary at retirement and alleviates SJCOG of any further liability.

REVENUES

Compared to the current year amended AFP, SJCOG general fund operating revenues are proposed to decrease from \$57,113,918 to \$47,315,919, which is a reduction of \$9,797,999. This change primarily reflects the planned drawdown of several large multi-year grant programs that were in peak implementation during Fiscal Year 2025-26. As for SJCOG capital projects, including SR 99/120 and I-205 Managed Lanes, significant expenditures are occurring in Fiscal Year 2025/26, with phase 1A of the SR 99/120 project completing construction in the summer. As those projects advance toward completion, associated grant or project delivery expenditures naturally decline in Fiscal Year 2026-27.



Federal funding for general fund activities is \$28,901,219 which is 5.37% lower than Fiscal Year 2025-2026. This is primarily due to the planned drawdown of I-205 Managed Lanes funds, and consumption of FTA 5304 pass through funds.

State funding sources are budgeted at \$8,593,012

or 49% lower primarily due to:

- \$5,292,852 drawdown on REAP 2.0
- \$507,429 drawdown on Regional Climate Collaborative grant.
- \$1,050,773 drawdown on Clean Mobility EV Bike program.
- \$825,508 drawdown on Clean Mobility EV Car Share program.
- \$344,730 drawdown on State Transportation Improvement Program (STIP) Planning Programming and Monitoring.
- Net drawdown of \$86,790 Freeway Service Patrol funding.
- \$411,884 drawdown has occurred on three years of Senate Bill 1 (SB1) Sustainable Transportation Planning Grants offset by a Fiscal Year 2026-27 allocation of \$363,600.

Local revenues are slightly higher by \$96,228.

EXPENDITURES

Salaries and Benefits remain stable at \$7,137,261.

The budget includes \$34,820 for longevity pay and \$315,488 or 7.5% of total salaries pool for merit-based raises. The salary-driven benefits adjust accordingly.

Services and Supplies are proposed to increase by \$35,000.

Liability insurance is increasing by \$25,000 due to increased premiums. Office expenses are increasing by \$10,000 due to increased costs for computer software and licensing.

Professional Services and Staff Augmentation will decrease by \$9,832,999 from FY 2025-2026 of \$47,859,656 to \$38,026,657.

There is planned consumption of several multi-year grants, which directly correlate to professional services.

- The prior year's SB-1 Sustainable Communities grants used \$474,880 and we are budgeting the new SB-1 allocation of \$350,000.

- The I-205 Managed Lanes Widening project drew down \$1,798,459
- We drew down on \$1,050,773 for EV Bike Share program, and \$825,508 for EV Car Share program.
- The San Joaquin Regional Climate Collaborative used \$507,429 while the Regional Early Action Plan (REAP 2.0) expended \$5,292,852.

Position Classification and Salary Schedule

Per board policy, the salary ranges at both the minimum and maximum levels are adjusted by the CPI change of 2.67%.

FISCAL IMPACT

The AFP assumes the continuation of currently programmed grant funding and revenue sources. The AFP is required to be adopted by the Board of Directors prior to April 1 each year and disseminated to the member agencies for ratification. The AFP is the traditional line-item budget identifying estimated revenues and expenditures for the fiscal year. The AFP is complementary to the Overall Work Program.

COMMITTEE ACTIONS:

Executive Committee — Unanimously approved the staff recommendation

RECOMMENDATION

That the Board adopt Resolution 2026-22 approving the Fiscal Year 2026-27 Annual Financial Plan.



**San Joaquin Council of Governments
ANNUAL FINANCIAL PLAN
Fiscal Year 2026/27**

Proposed Final March 26, 2026

CHAIR

Mayor Christina Fugazi, City of Stockton

VICE-CHAIR

Mayor Gary Singh, City of Manteca

BOARD OF DIRECTORS

Councilmember Jeremy Engle

Councilmember Lisa Craig

Mayor Paul Akinjo

Mayor Andy Su

Councilmember Leo Zuber

Councilmember Mario Enriquez

Councilmember Mariela Ponce

Mayor Dan Arriola

Supervisor Sonny Dhaliwal

Supervisor Steven Ding

Supervisor Robert Rickman

City of Escalon

City of Lodi

City of Lathrop

City of Mountain House

City of Ripon

City of Stockton

City of Stockton

City of Tracy

County of San Joaquin

County of San Joaquin

County of San Joaquin

EX OFFICIO DIRECTORS

Grace Magsayo, Director

Derek Graves, Jr, Chair

Margaret Shea Stephens, Commissioner

Caltrans District 10

San Joaquin Regional Transit District

Port of Stockton

SUBMITTED BY:

Diane Nguyen

Executive Director

Grace Orosco

Deputy Director of Finance and Administration

San Joaquin Council of Governments
ANNUAL FINANCIAL PLAN
Fiscal Year 2026/2027
Proposed Final March 26, 2026

	FY 2025-26	FY 2026-27	+/-	+/-
REVENUES	Amendment #3	Proposed Draft	Change	% Change
Federal Grants	30,541,057	28,901,219	(1,639,838)	-5.37%
State Grants	16,847,401	8,593,012	(8,254,389)	-49.00%
Local	9,625,460	9,721,688	96,228	1.00%
Interest	40,000	40,000	-	0.00%
Other	60,000	60,000	-	0.00%
SJCOG OPERATING REVENUE	57,113,918	47,315,919	(9,797,999)	-17.16%
EXPENDITURES				
<i>Salaries & Benefits</i>	7,137,261	7,137,261	-	0.00%
<i>Services & Supplies</i>				
Office, Computer License	367,000	377,000	10,000	2.72%
Communications	60,000	60,000	-	0.00%
Memberships	45,000	45,000	-	0.00%
Maintenance - Equipment	10,000	10,000	-	0.00%
Rents & Leases - Equipment	131,000	131,000	-	0.00%
Publications & Legal Notices	7,500	7,500	-	0.00%
Insurance	278,000	303,000	25,000	8.99%
Building Operations & Maintenance	335,000	335,000	-	0.00%
SJCOG Building Debt Service Principal and Interest	200,000	200,000	-	0.00%
<i>Transportation/Travel</i>				
Transportation,Travel & Training (In & Out of State)	233,000	233,000	-	0.00%
<i>Professional Services</i>	47,859,656	38,026,657	(9,832,999)	-20.55%
Capital Outlay	450,500	450,500	-	0.00%
SJCOG OPERATING EXPENDITURES	57,113,918	47,315,919	(9,797,999)	-17.16%

San Joaquin Council of Governments
ANNUAL FINANCIAL PLAN
 Fiscal Year 2026/2027
 Proposed Final March 26, 2026
REVENUE

Revenue Source	FY 2025-26	FY 2026-27	+/-
	Amendment #3	Proposed Draft	Change
FEDERAL GRANTS			
<i>U.S. Department of Transportation:</i>			
Annual Federal Highway Administration (PL)	1,780,895	1,780,895	-
FHWA PL (Estimated Carryover)		5,000	5,000
Annual Federal Highway Administration PL (2.5% for Complete Streets)		45,664	45,664
FHWA PL (Air Quality Planning/Modeling) FY25/26 expires 6/30/2027	200,000	50,000	(150,000)
FHWA PL (2.5% for Complete Streets) FY 23/24 estimated carryover expires 6/30/2026	11,686	-	(11,686)
FHWA PL (2.5% for Complete Streets) FY 24/25 estimated carryover expires 6/30/2027	41,598	-	(41,598)
FHWA PL (2.5% for Complete Streets) FY 25/26 estimated carryover expires 6/30/2028	45,664	5,000	(40,664)
Annual Federal Transit Administration MPO Planning (FTA 5303)	485,855	476,875	(8,980)
FTA MPO Planning Section 5303 (Estimated Carryover, expires 6/30/28)	-	5,000	5,000
Strategic Partnerships FTA 5304- Stockton	267,675	-	(267,675)
Strategic Partnerships FTA Section 5304 - Lodi	450,000	430,000	(20,000)
RSTPCML 6088(068) I-205 Managed Lanes Widening	4,063,459	2,300,000	(1,763,459)
TDM - Merced CAG CMAQ	400,273	321,000	(79,273)
CMAQ TDM 6088(081)	300,000	-	(300,000)
CMAQ TDM 6088(093)		1,000,000	1,000,000
Charging and Fueling Infrastructure Grant (CFI)	15,000,000	15,000,000	-
FTA pass through Minnesota University for Mobility, Access & Transp Insecurity Program	12,167	-	(12,167)
U.S. Department of Transportation - Community Project Fund	5,500,000	5,500,000	-
Federal Surface Transportation Block Grant (STBG)	1,981,785	1,981,785	-
SUBTOTAL	30,541,057	28,901,219	(1,639,838)
STATE GRANTS			
<i>California Department of Transportation:</i>			
STIP Planning & Programming 24/25	482,000	-	(482,000)
STIP Planning & Programming 25/26	344,730	-	(344,730)
STIP Planning & Programming 26/27	-	482,000	482,000
FY 23/24 Caltrans Sustainable Transportation Planning Grant (SB1)	225,906	-	(225,906)
FY 24/25 Caltrans Sustainable Transportation Planning Grant (SB1)	206,478	20,500	(185,978)
FY 25/26 Caltrans Sustainable Transportation Planning Grant (SB1)	363,600	363,600	-
FY 26/27 Caltrans Sustainable Transportation Planning Grant (SB1)		363,600	363,600
Caltrans-FSP24 (6088-083) FY 23-24 allocation	14,021	-	(14,021)
Caltrans-FSP25 (6088-086) FY 24-25 allocation	575,847	-	(575,847)
Caltrans-FSP26 (6088-092) FY 25-26 allocation	576,637	576,637	-
Caltrans-FSP27 (6088-xxx) FY 26-27 allocation		576,637	576,637
Caltrans-FSP25 SB1 (6088-087) FY 24-25 allocation	473,559	-	(473,559)
Caltrans-FSP26 SB1 (6088-094) FY 25-26 allocation	498,420	400,000	(98,420)
Caltrans-FSP27 SB1 (6088-xxx) FY 26-27 allocation		498,420	498,420
SB 125 Transit & Intercity Rail Capital Program (TIRCP) FY23-24 allocation	337,155	215,155	(122,000)
SB 125 Transit & Intercity Rail Capital Program (TIRCP) FY24-25 allocation	200,178	200,178	-
SB 125 Zero Emission Transit Capital Program (ZETCP) FY23-24 allocation	50,318	50,318	-
SB 125 Zero Emission Transit Capital Program (ZETCP) FY24-25 allocation	28,227	28,227	-
State Transit Assistance	411,688	191,900	(219,788)
Clean Mobility Options Program(EV Car Share)	1,125,508	300,000	(825,508)
Clean Mobility Options Program (EV Bike Share funded by California Air Resources Board)	1,666,773	616,000	(1,050,773)
Regional Climate Collaborative grant	837,429	330,000	(507,429)
SJV Regional Early Action Planning Committee for Housing (REAP 2.0)	8,092,852	2,800,000	(5,292,852)
Climate Adaptation Planning Grant (SHA-CAP)	336,075	195,000	(141,075)
25/26 Sustainable Communities Competitive (SB1) (Expires 12/31/27)		384,840	384,840
SUBTOTAL	16,847,401	8,593,012	(8,254,389)
LOCAL			
TDA (LTF Planning + TDA Administration)	2,163,656	2,182,393	18,737
Measure K Project Management	1,000,000	1,000,000	-
Measure K Administration	910,130	920,955	10,825
Measure K dibs	3,401,849	3,401,849	-
Local Transportation Authority (SJRHTF)		100,000	100,000
RTIF for I-205 project	341,491	341,491	-
RTIF 3rd party costs			-
RTIF Admin	35,000	35,000	-
Valley MPOs Air Quality Planning	200,000	200,000	-
SACOG TDM (Trip Planning System, 511, dibs)	174,000	174,000	-
SACOG FSP Match	356,000	356,000	-
COG Fees	10,000	10,000	-
Roth Road Cost Sharing MOU	333,334	300,000	(33,334)
SJCOG INC	700,000	700,000	-
SUBTOTAL	9,625,460	9,721,688	96,228
OTHER			
Interest	40,000	40,000	-
Other (ALUC Fees+doc fees)	60,000	60,000	-
SUBTOTAL	100,000	100,000	-
TOTAL REVENUE	57,113,918	47,315,919	(9,797,999)

San Joaquin Council of Governments
 ANNUAL FINANCIAL PLAN
 Fiscal Year 2026/2027
 Proposed Final March 26, 2026

SERVICE AND SUPPLIES

Title	Line Item Description	FY 2025-26	FY 2026-27	+/-
		Amendment #3	Proposed Draft	Change
Office Expense				-
General Supplies		41,000	41,000	
Recognition		500	500	-
Printing		4,000	4,000	-
Noncapital Equip/Furniture		35,000	35,000	-
Computer Software & License		280,000	290,000	10,000.00
Postage		4,500	4,500	-
Subscriptions		2,000	2,000	-
<i>Office Expense - Subtotal</i>		<i>367,000</i>	<i>377,000</i>	<i>10,000.00</i>
Communications		60,000	60,000	-
Memberships		45,000	45,000	-
Maintenance - Equipment		10,000	10,000	-
Rents & Leases - Equipment		131,000	131,000	-
Publications & Legal Notices		7,500	7,500	-
Insurances		278,000	303,000	25,000.00
Building Maintenance		335,000	335,000	-
Building Debt Service - Principle & Interest		200,000	200,000	-
TOTAL SERVICES & SUPPLIES		1,433,500	1,468,500	35,000.00

San Joaquin Council of Governments
ANNUAL FINANCIAL PLAN
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Transportation Travel & Training

	FY 2025-26	FY 2026-27	+/-
	Amendment #3	Proposed Draft	Change
In and Out of State Travel	130,000	130,000	-
Training	100,000	100,000	-
Rideshare Incentive	3,000	3,000	-
Total Transportation & Travel	233,000	233,000	-

San Joaquin Council of Governments
 ANNUAL FINANCIAL PLAN
 Fiscal Year 2026/2027
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PROFESSIONAL SERVICES

<i>Work Element No./Project Description</i>	FY 2025-26	FY 2026-27	+/-
	Amendment #3	Proposed Draft	Change
601.01--Regional Transportation Plan	234,277	234,277	-
601.0181--SCS Implementation FY 23/24 SB1 grant	232,856	-	(232,856)
601.0182--SCS Implementation FY 24/25 SB1 grant	195,422	9,444	(185,978)
601.0183--SCS Implementation FY 25/26 SB1 grant	361,407	305,361	(56,046)
601.0184--SCS Implementation FY 26/27 SB1 grant	-	350,000	350,000
601.019--Regional Transportation Plan Implementation	445,750	445,750	-
601.02--Regional Planning Studies	552,686	519,350	(33,336)
602.01--RTIP	333,487	333,487	-
602.02--Active Transportation (Bicycle & Pedestrian) Complete Streets Planning & Coordination	76,804	76,804	-
603.01--Road & Street Monitoring	1,145,222	1,145,222	-
603.015--I-205 Managed Lanes Widening Project	5,981,786	4,183,327	(1,798,459)
603.018-- Rte 99/120 Phase 1B Design	5,500,000	5,500,000	-
603.02--Transit Coordination	244,560	244,560	-
603.021 -- SB 125 CalSTA	571,725	571,725	-
603.0201--Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan	87,463	-	(87,463)
603.0202--Lodi Multimodal Transportation Network and Land Use Compatibility Action Plan	450,000	430,000	(20,000)
603.0203--Flood Adaptation Strategy for State Route 4 through the San Joaquin Delta River	379,616	238,541	(141,075)
603.0204--Empowering Sustainable Communities: Mobility Hub Design and First Last Mile solutions in SJC	-	384,840	384,840
603.03--Transportation Air Quality	350,000	350,000	-
603.04--Goods Movement	-	-	-
701.01--Technical Assistance	636,976	636,976	-
801.01--Intergovernmental Coordination	150,000	150,000	-
801.02--Projections & Forecasts	157,200	157,200	-
801.03--Airport Land Use Commission	29,600	29,600	-
801.04--Congestion Management	120,000	120,000	-
801.05--Regional Planning	102,000	102,000	-
801.06--Valley MPO Coordination	84,469	84,469	-
801.09--SJCOG Inc	85,000	85,000	-
901.01--Measure K	207,000	307,000	100,000
901.02--RTIF	220,500	220,500	-
901.03--Smart Growth	-	-	-
1001.01--COG OWP	-	-	-
1001.02--TDA Administration	211,469	211,469	-
1001.03--Community Involvement	-	-	-
1101.01--Transportation Demand Management	2,579,209	2,229,935	(349,274)
1201.01--Freeway Service Patrol	2,915,218	2,828,428	(86,790)
1201.03 - SJCOG Interns	108,000	108,000	-
1301.01 - Performance Based Planning and Programming	18,000	18,000	-
1350.01 - SJV Regional Early Action Planning Committee for Housing (REAP)	-	-	-
1350.02 - SJV Regional Early Action Planning Committee for Housing (REAP 2.0)	6,586,377	1,293,525	(5,292,852)
1375.01 - Sustainable Transportation Equity Project (STEP)	-	-	-
1379.01 - Clean Mobility Options Voucher Program (EV Bike Share funded by California Air Resources Board)	1,666,773	616,000	(1,050,773)
1380.01 - CMO voucher program	1,125,508	300,000	(825,508)
1382.01 - San Joaquin Regional Climate Collaborative	974,596	467,167	(507,429)
1383.01 - Clean Fuels Infrastructure (CFI) project	12,452,108	12,452,108	-
Indirect	286,592	286,592	-
TOTAL PROFESSIONAL SERVICES	47,859,656	38,026,657	(9,832,999)

**San Joaquin Council of Governments
ANNUAL FINANCIAL PLAN
Fiscal Year 2026/2027
Proposed Final March 26, 2026**

FIXED ASSETS

		FY 2025-26	FY 2026-27	+/-
<i>Title</i>	<i>Description</i>	Amendment #3	Proposed Draft	Change
	Office Furniture/Equipment	\$10,000	\$10,000	-
	Replacement Printers (2)	\$0		-
	Server Upgrade	\$20,500	\$20,500	-
	EV Charging station	\$0		-
	Board Room	\$0		-
	Computer Upgrades	\$20,000	\$20,000	-
	3rd Floor Construction	\$0		-
	Capitalized Building Maintenance/Upgrades	\$400,000	\$400,000	-
TOTAL ASSETS		\$450,500	\$450,500	-

POSITION CLASSIFICATIONS & SALARY SCHEDULE
ANNUAL

Adopted on March 26, 2026 - Effective July 1, 2026

Position	Minimum	Maximum
	12 month Change in CPI 2.67% New	New
GROUP A		
Executive Director	CONTRACT	CONTRACT
GROUP B		
Deputy Director Planning	\$ 189,367.63	\$ 265,115.42
Deputy Director of Programming & Project Delivery		
Deputy Director of Finance and Administration		
GROUP C		
No position in this group	\$ 167,581.50	\$ 234,615.31
GROUP D		
Regional Planning or Programming Manager	\$ 148,961.58	\$ 208,545.97
GROUP E		
Habitat Conservation Program Manager	\$ 134,199.28	\$ 187,879.22
Information Technology Manager		
Communications Manager		
Manager of Finance		
GROUP F		
Chief Accountant	\$ 113,498.38	\$ 169,260.55
Senior Regional Planner		
Senior Program Specialist		
GROUP G		
Senior Habitat Planner	\$ 120,000.00	\$ 138,625.14
GROUP H		
Associate Regional Planner	\$ 99,017.43	\$ 138,625.14
Associate Habitat Planner		
Public Information Officer/Communicational Journalist		
GROUP I		
Human Resources Assistant	\$ 90,015.62	\$ 126,022.85
Office Administrator		
GROUP J		
Associate Program Specialist	\$ 81,833.06	\$ 114,565.78
Contract/Grants Specialist		
Senior Accountant		
GROUP K		
Assistant Regional Planner	\$ 74,393.46	\$ 104,150.60
Assistant Program Specialist		
Associate Habitat Planner		
Junior Accountant		
Assistant Office Administrator		
GROUP L		
No position in this group	\$ 67,630.42	\$ 94,682.59
GROUP M		
Administrative Technician	\$ 61,482.42	\$ 86,075.63
Accounting Assistant II		
GROUP N		
No position in this group	\$ 55,747.73	\$ 78,046.83
GROUP O		
Accounting Assistant I	\$ 51,618.33	\$ 72,265.39
Administrative Clerk II		



**RESOLUTION
SAN JOAQUIN COUNCIL OF GOVERNMENTS**

R-2026-22

**RESOLUTION APPROVING THE ADOPTION OF THE 2026-2027
ANNUAL FINANCIAL PLAN
FOR THE SAN JOAQUIN COUNCIL OF GOVERNMENTS**

WHEREAS, the San Joaquin Council of Governments is required by the Joint Powers Agreement to adopt a budget (Annual Financial Plan) annually, and

WHEREAS, the adopted budget is to be sent to the member agencies for ratification.

NOW THEREFORE BE IT RESOLVED, that the San Joaquin Council of Governments adopts the FY 2026-2027 Annual Financial Plan and directs the Executive Director to transmit it to the member agencies for ratification.

PASSED AND ADOPTED this 26th day of March 2026 by the following vote of the San Joaquin Council of Governments, to wit:

AYES:

NOES:

ABSENT:

Christina Fugazi, Chair

AGENDA ITEM **4E**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Approve Fiscal Year 2025-26 Overall Work Program Amendment No. 4

RECOMMENDED ACTION: Adopt Resolution R-2026-23 Approving Amendment No. 4 to the Fiscal Year 2025-26 Overall Work Program

SUMMARY:

The San Joaquin Council of Governments (SJCOG) Board of Directors adopted the Fiscal Year (FY) 2025-26 Overall Work Program (OWP) and Annual Financial Plan (AFP) on March 27, 2025. The Board approved AFP and OWP Amendment No. 1 on August 28, 2025, Amendment No. 2 on September 25, 2025, and Amendment No. 3 on December 4, 2025. Amendments are periodically brought forward to program new revenues, adjust expenditures, capture prior year carryover, and align with prior-year audits.

SJCOG has a deadline of May 6, 2026, for the final reallocation of federal funds between work elements. This amendment is intended to comply with that deadline and to direct federal funds toward work elements that have experienced increased levels of activity.

RECOMMENDATION:

Adopt Resolution R-2026-23 approving Amendment No. 4 to the FY 2025-26 OWP.

FISCAL IMPACT:

This amendment results in no net change to total OWP revenues or expenditures. Funds are only reallocated between work elements.

BACKGROUND:

The OWP outlines ongoing and collaborative objectives presented as work products that guide activities throughout the fiscal year. It serves as a management tool that identifies transportation planning activities, tasks and products required by federal and state laws.

REVENUE CHANGE:

The changes made to the OWP only moved funds between work elements. There was no increase or decrease of revenue.

ATTACHMENTS:

1. OWP Recap of Change
2. OWP Revenue and Expenditure Tables
3. Resolution R-2026-23

Prepared by: Rosie Zeiter, Accounting Assistant II

Recap of Changes
FY25/26
Final March 27, 2025
Amendment #1 August 28, 2025
Amendment #2 September 25, 2025
Amendment #3 December 4, 2025
Amendment #4 March 26, 2026

Work Element	Starting Balance	FHWA PL (Complete Streets)			Other Funding Sources			Ending Balance
		FHWA PL	FTA 5303	Federal - STBG	SB1			
601.01 Regional Transportation Plan	1,129,511.00	(200,000)	200,000					1,129,511.00
601.019 Regional Transportation Plan Implementation	310,217.00		(50,000)					260,217.00
601.02 Regional Transportation Plan Studies	580,403.00		(150,000)					430,403.00
602.01 Transportation Improvement Plan	629,661.00							629,661.00
603.01 Roads & Streets Planning	630,082							630,082
603.03 Transportation Air Quality Plan/Modeling	577,219	(25,000)						552,219
1001.01 COG OWP Management & Admin	123,436	25,000						148,436
1001.03 Community Involvement	663,754	200,000						863,754
	4,644,283	-	-	-	-	-	-	4,644,283

Revenues By Funding Source
 FISCAL YEAR 2025/26
 Final March 27, 2025
 Amendment #1 August 28, 2025
 Amendment #2 September 25, 2025
 Amendment #3 December 4, 2025
 Amendment #4 March 26, 2026

Funding Sources	FY	FY	+/- \$ Change
	2025-26 Amendment #3	2025-26 Amendment #4	
Annual FHWA PL	1,780,895.00	1,780,895.00	-
FHWA PL (FY 24/25 Estimated Carryover expires 6/30/27)	-	-	-
Annual FHWA PL (FY 25/26 2.5% for Complete Streets)	45,664.00	45,664.00	-
FHWA PL (2.5% for Complete Streets) FY 23/24 estimated carryover expires 6/30/2026	11,685.61	11,685.61	-
FHWA PL (2.5% for Complete Streets) FY 24/25 estimated carryover expires 6/30/2027	41,598.00	41,598.00	-
FHWA PL (Air Quality Planning/Modeling) FY25/26 (Expires 6/30/2028)	200,000.00	200,000.00	-
Annual FTA MPO Planning Section 5303	485,855.00	485,855.00	-
FTA MPO Planning Section 5303 (FY 24/25 Estimated Carryover, expires 6/30/27)	-	-	-
Strategic Partnerships FTA Section 5304 - Stockton (Expires 8/31/26) (Estimated carryover)	267,675.04	267,675.04	-
Strategic Partnerships FTA Section 5304 - Lodi (Expires 8/29/27)	450,000.00	450,000.00	-
24/25 Climate Adaptation Planning Grant (SHA-CAP) (SB) 1 (Expires 8/29/27)	336,075.32	336,075.32	-
23/24 Caltrans Sustainable Transportation Planning Grant (SB) 1 (Expires 2/28/2026)	225,905.93	225,905.93	-
24/25 Caltrans Sustainable Transportation Planning Grant (SB) 1 (Expires 2/28/2027)	206,477.78	206,477.78	-
25/26 Caltrans Sustainable Transportation Planning Grant (SB) 1 (Expires 2/28/2028)	363,600.00	363,600.00	-
Merced CAG TDM CMAQ	400,273.33	400,273.33	-
SB 125 Transit & Intercity Rail Capital Program (TIRCP) FY23/24	337,155.98	337,155.98	-
SB 125 Transit & Intercity Rail Capital Program (TIRCP) FY24/25	200,178.42	200,178.42	-
SB 125 Zero Emission Transit Capital Program (ZETCP) FY23/24	50,318.10	50,318.10	-
SB 125 Zero Emission Transit Capital Program (ZETCP) FY24/25	28,227.23	28,227.23	-
STIP Planning & Programming 24/25 allocation	344,729.66	344,729.66	-
STIP Planning & Programming 25/26 allocation	482,000.00	482,000.00	-
RPSTCML 6088(068) I-205 Managed Lanes Widening from 6 to 8 lanes	4,063,458.68	4,063,458.68	-
Federal STBG	1,981,785.00	1,981,785.00	-
Department of Transportation - Community Project Funding	5,500,000.00	5,500,000.00	-
Local Planning Contribution (LTF) (2.9%)	1,873,656.00	1,873,656.00	-
TDA Administration	290,000.00	290,000.00	-
Local Transportation Authority (Project Management)	1,000,000.00	1,000,000.00	-
Local Transportation Authority (1% Administration)	910,130.00	910,130.00	-
Local Transportation Authority (Dibs Rideshare)	3,401,849.00	3,401,849.00	-
Caltrans-FSP FY 23-24 allocation FSP24-6088(083)	14,021.27	14,021.27	-
Caltrans-FSP FY 24-25 allocation FSP25-6088(086)	575,847.00	575,847.00	-
Caltrans-FSP FY 25-26 allocation FSP26-6088(092)	576,637.00	576,637.00	-
Caltrans-FSP25 SB1 (6088-087) FY 24-25 allocation	473,558.56	473,558.56	-
Caltrans-FSP26 SB1 (6088-094) FY 25-26 allocation	498,420.00	498,420.00	-
Valley MPOs	200,000.00	200,000.00	-
Roth Road Cost Sharing MOU	333,334.00	333,334.00	-
COG Fees and Services	10,000.00	10,000.00	-
ALUC	60,000.00	60,000.00	-
RTIF I-205 project	341,491.00	341,491.00	-
RTIF Admin	35,000.00	35,000.00	-
State Transit Assistance(STA)	191,900.00	191,900.00	-
State Transit Assistance(STA carryover)	219,788.00	219,788.00	-
SJCOGI (Habitat)	700,000.00	700,000.00	-
Congestion Mitigation/Air Quality (6088-081)	300,000.00	300,000.00	-
SAFE (511 & FSP)	356,000.00	356,000.00	-
SACOG (TDM Vanpools)	174,000.00	174,000.00	-
SJV Regional Early Action Planning Committee for Housing (REAP 2.0)	8,092,851.56	8,092,851.56	-
Clean Mobility Options Program (EV Car Share funded by California Air Resources Board)	1,125,508.42	1,125,508.42	-
Clean Mobility Options Program (EV Bike Share funded by California Air Resources Board)	1,666,773.00	1,666,773.00	-
FTA pass through Minnesota University for Mobility, Access & Transportation Insecurity Program	12,167.27	12,167.27	-
Regional Climate Collaborative grant	837,428.68	837,428.68	-
Charging and Fueling Infrastructure Grant (CFI)	15,000,000.00	15,000,000.00	-
Interest/Other	40,000.00	40,000.00	-
SJCOG Total	57,113,918.84	57,113,918.84	-
Pass Through funds for Planning Studies			
Stockton FTA 5304 (Local Match - cash)	13,230.07	13,230.07	-
Stockton FTA 5304 (Local Match - in-kind)	22,038.33	22,038.33	-
Lodi FTA 5304 (Local Match - cash)	11,700.00	11,700.00	-
Lodi FTA 5304 (local Match - in-kind)	46,800.00	46,800.00	-
Mountain House Planning Funds	59,900.00	59,900.00	-
SJRTD FTA 5307	-	-	-
SJRTD Planning Funds	-	-	-
SJRTD (STA)	-	-	-
Escalon Local Funds	70,000.00	70,000.00	-
Escalon FTA 5311	30,000.00	30,000.00	-
Lathrop FTA 5307	-	-	-
Lathrop Planning Funds	25,000.00	25,000.00	-
Lodi FTA 5307	-	-	-
Lodi Planning Funds	-	-	-
SJRRR FTA 5307	200,000.00	200,000.00	-
SJRRR Planning Funds	50,000.00	50,000.00	-
Manteca FTA 5307	-	-	-
Manteca Planning Funds	-	-	-
CFI Grant Private Partner (In-Kind Match)	3,750,000.00	3,750,000.00	-
Grand Total	61,392,587.24	61,392,587.24	-
SJCOG FTA 5303 Toll Credits	55,727.57	-	-
SJCOG FHWA PL Toll Credits	227,208.66	-	-

** Toll credits provided by the State of California are being utilized as a match for federal FHWA PL and FTA 5303 funds. The FHWA PL and FTA 5303 amounts shown in the Budget Revenue Summary Sheet represent 100% of the total federal participation costs, therefore toll credits are not included in the total revenue amount.

Expenditures by Funding Source
 Fiscal Year 2025/26
 Amendment #1 August 28, 2025
 Amendment #2 September 25, 2025
 Amendment #3 December 4, 2025
 Amendment #4 March 26, 2026

	601.01	601.0181	601.0182	601.0183	601.019	601.02	602.01	602.02	603.01	603.015	603.018	603.02	603.021	603.0201	603.0202	603.0203	603.03	603.04	701.01	801.01	801.02
	RTP	SB1 FY23/24	SB1 FY24/25	SB1 FY25/26	RTP Impl.	RTP Studies	TIP	Complete Streets	Streets & Hwy	I-205 Prj. Dev.	RTE 99/120 1B	Transit Coord.	SB125	Stockton Multimodal	Lodi Multimodal	Flood Adaptation	Air Quality Planning Modeling	Goods Movement	Technical Asst.	Inter. Govt. Coord.	Projections & Forecasts
Federal FHWA - PL	903,873.00				25,000.00			98,947.61									352,219.00				
Federal FTA 5303	225,638.00				235,217.00	25,000.00															
Federal FTA 5304 Stockton														267,675.04							
Federal FTA 5304 Lodi															450,000.00						
Federal STBG										1,981,785.00											
DOT- Community Project Funding											5,500,000.00										
SB1 - Climate Adaption Planning Grant																336,075.32					
CT(RPSTCML) 10-6088(068)										4,063,458.68											
RTIF										341,491.00											
STIP							482,000.00		344,729.66												
SB1 - Planning Grant FY23/24		225,905.93																			
SB1 - Planning Grant FY24/25			206,477.78																		
SB1 - Planning Grant FY25/26				363,600.00																	
SB1 - FSP																					
Caltrans - FSP																					
LTF		29,268.51	26,751.39	47,108.23					50,000.00							43,542.12			327,598.19	407,579.00	334,388.39
LTA - MK						72,069.00	147,661.00		235,352.00									78,881.00	76,512.00		
TDA																					
ALUC																					
Fees/Int																				18,000.00	
CMAQ																					
MCAG																					
SAFE																					
SJCOG INC																					
Valley MPOs																	200,000.00				
Roth Rd Cost Share						333,334.00															
REAP2.0																					
CMO - Carshare																					
CMO - Bikeshare																					
FTA - MATI																					
RCC Grant																					
DOT - CFI Grant																					
TIRCP													537,334.40								
ZETCP													78,545.33								
STA												411,688.00									
Total	1,129,511.00	255,174.44	233,229.17	410,708.23	260,217.00	430,403.00	629,661.00	98,947.61	630,081.66	6,386,734.68	5,500,000.00	411,688.00	615,879.73	267,675.04	450,000.00	379,617.44	552,219.00	78,881.00	404,110.19	425,579.00	334,388.39

	801.03	801.04	801.05	801.06	801.09	901.01	901.02	901.03	1001.01	1001.02	1001.03	1101.01	1201.01	1201.03	1301.01	1350.02	1379.01	1380.01	1382.01	1383.01	Total
	ALUC	Congestion Management	Regional Planning	Valley MPO	Habitat Impl.	Impl. MK	RTIF	Smart Growth	OWP	TDA	Comm. Invol.	TDM	FSP	Interns	Perf. Planning & Prog.	REAP2.0	CMO - Bike	CMO - Car	RCC	CFI	
Federal FHWA - PL									148,436.00		551,367.00										2,079,842.61
Federal FTA 5303																					485,855.00
Federal FTA 5304 Stockton																					267,675.04
Federal FTA 5304 Lodi																					450,000.00
Federal STBG																					1,981,785.00
DOT- Community Project Funding																					5,500,000.00
SB1 - Climate Adapatation Planning Grant																					336,075.32
CT(RPSTCML) 10-6088(068)																					4,063,458.68
RTIF							35,000.00														376,491.00
STIP																					826,729.66
SB1 - Planning Grant FY23/24																					225,905.93
SB1 - Planning Grant FY24/25																					206,477.78
SB1 - Planning Grant FY25/26																					363,600.00
SB1 - FSP													971,978.56								971,978.56
Caltrans - FSP													1,166,505.27								1,166,505.27
LTF				179,211.00						428,209.17											1,873,656.00
LTA - MK		138,565.00	133,219.00			445,305.00	38,215.00	37,581.00			312,387.00	3,401,849.00		105,000.00	89,383.00						5,311,979.00
TDA										290,000.00											290,000.00
ALUC	60,000.00																				60,000.00
Fees/Int			5,000.00			25,500.00				1,500.00											50,000.00
CMAQ												300,000.00									300,000.00
MCAG												400,273.33									400,273.33
SAFE												174,000.00	356,000.00								530,000.00
SJCOG INC					700,000.00																700,000.00
Valley MPOs																					200,000.00
Roth Rd Cost Share																					333,334.00
REAP2.0																8,092,851.56					8,092,851.56
CMO - Carshare																		1,125,508.42			1,125,508.42
CMO - Bikeshare																1,666,773.00					1,666,773.00
FTA - MATI																				12,167.27	12,167.27
RCC Grant																				837,428.68	837,428.68
DOT - CFI Grant																				15,000,000.00	15,000,000.00
TIRCP																					537,334.40
ZETCP																					78,545.33
STA																					411,688.00
Total	60,000.00	138,565.00	138,219.00	179,211.00	700,000.00	470,805.00	73,215.00	37,581.00	148,436.00	719,709.17	863,754.00	4,276,122.33	2,494,483.83	105,000.00	89,383.00	8,092,851.56	1,666,773.00	1,125,508.42	849,595.95	15,000,000.00	57,113,918.84



**RESOLUTION
SAN JOAQUIN COUNCIL OF GOVERNMENTS**

R-2026-23

**RESOLUTION ADOPTING AMENDMENT #4
TO THE SAN JOAQUIN COUNCIL OF GOVERNMENTS'
FY 25/26 OVERALL WORK PROGRAM**

BE IT RESOLVED that the SJCOG Board acting as the Metropolitan Planning Organization for San Joaquin County does hereby approve amendment #4 to the FY2025/2026 Overall Work Program.

PASSED AND APPROVED this 26th day of March 2026, by the following votes of the San Joaquin Council of Governments, to wit;

AYES:

NOES:

ABSENT:

Christina Fugazi, Chair

AGENDA ITEM **4F**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Award Contract for Construction of the Tracy Transit Station Mobility Hub Improvements Project

RECOMMENDED ACTION: Authorize the Executive Director to Award the Construction Contract to the Lowest Responsible Bidder, Globe Engineering Development, for \$1,144,902 and up to a 10% Contingency Amount for Change Orders

DISCUSSION:

SUMMARY:

The Regional Multi-Modal Connectivity Plan and Demonstration Project is a strategic initiative funded by the California Department of Housing and Community Development (HCD) through the state Regional Early Action Planning (REAP) 2.0 grant program. The project supports state objectives to integrate housing, transportation, and climate goals by developing a countywide clean mobility hub network.

In May 2024, Tranzito was contracted to provide both a planning phase and implementation phase for the project. The planning phase is now complete resulting in a San Joaquin Regional Mobility Hub Plan. The current implementation phase includes delivery of one mobility hub demonstration project which has been identified in the plan as the Tracy Transit Station Mobility Hub Improvement Project.

Beginning in March 2025, Tranzito in close coordination with SJCOG and City of Tracy, began the design of the project. By early January 2026, plans, specifications and estimates were complete, and the San Joaquin Council of Governments (SJCOG) released a Notice Inviting Bids for the project on January 27, 2026.

Bids were due on March 10, 2026. SJCOG reviewed bid proposals from two bidders and found Globe Engineering Development to be the lowest responsible bidder for the project. SJCOG has determined the firm's submission to be responsive to the notice.

RECOMMENDATION:

Authorize the SJCOG Executive Director to award the contract to Globe Engineering Development for an amount not to exceed \$1,144,902, with up to a 10 percent contingency in an amount of \$114,490. The 10% contingency amount is a not-to-exceed amount to allow staff to address unforeseen changes in the scope under a contract change order.

The project construction is anticipated to begin immediately and be completed by November 2026.

FISCAL IMPACT:

The project is identified in the FY 2025-26 Overall Work Program (OWP) and is funded with REAP 2.0 program grant funding through HCD. Funds also include a previous reallocation of existing REAP 2.0 funds from the City of Tracy to the demonstration project scope. The proposed contract will be covered within the current budget in the OWP and will not require a budget amendment.

BACKGROUND:

Project Description

The Tracy Transit Station Mobility Hub Improvement Project is the first mobility hub demonstration project to be implemented from the San Joaquin Regional Mobility Hub Plan completed in February 2025. This project is to inform future mobility hub implementation and community development efforts across the region.

The project includes the following key infrastructure elements:

- Bike/pedestrian safety and mobility enhancements
- EV Level 3 (fast) charging stations
- Rideshare zones with concrete raised platform
- Park and Ride shelter, picnic seating, real-time information displays
- Bike charging and locker amenities
- Wayfinding signs and public art

The project is at the existing Tracy Transit Station. The implementation phase will be in close coordination with the City of Tracy. Construction management consultant, 4Leaf was selected to manage the construction on behalf of SJCOG. Tranzito will continue to provide design support during the construction phase, administer the contract for the public art element to be fabricated and installed, and provide support for public outreach.

Evaluation Process

SJCOG received two bids for this Project. The bid proposals were unsealed electronically on the procurement website via a virtual meeting on March 10, 2026. Bid proposals were received from the following two bidders:

Contractor	Bid Amount
Globe Engineering Development	\$1,144,902.00
G.C.J. Inc.	\$1,305,023.80

Based on the review of bid proposals submitted, SJCOG staff has reviewed the low bid proposal from Globe Engineering Development and has found it to be complete and responsive.

NEXT STEPS:

Upon SJCOG Board approval, staff will finalize the contract for execution. The selected bidder will begin mobilization of the construction work immediately with anticipation of completion in November 2026.

Prepared by: Ann Herner, Project Engineer/Manager

AGENDA ITEM **4G**



March 2026
SJRHF, Inc. Board

STAFF REPORT

SUBJECT: Approve Additional Technical Member Appointments for the San Joaquin Regional Housing Fund Inc. Advisory Committee

RECOMMENDED ACTION: Recommend Approval of Fritz Huber and Jonathan Mendelson as Two Remaining Technical Members for the San Joaquin Regional Housing Fund Inc. Advisory Committee

DISCUSSION:

SUMMARY:

In January 2026, Kristine Williams was appointed as the first technical member for the San Joaquin Regional Housing Fund Inc. Advisory Committee (HFC). Committee members also expressed interest in identifying additional candidates with expertise in areas such as finance and banking, contractor and development experience, and housing services or community support. At their March 2026 meeting, the HFC considered additional candidates and recommended two remaining technical members. Staff requests the board's action to formally appoint the two remaining technical members. Attachment 1 contains supplemental information about Fritz Huber and Jonathan Mendelson.



The HFC was established to provide guidance on program design, project funding recommendations, and long-term strategy for the regional housing fund. In December 2025, the SJRHF Board appointed representatives from each participating jurisdiction (eight cities and the County of San Joaquin) to serve as the committee's voting members.

In addition to jurisdictional representatives, the resolution establishing the HFC authorizes up to three non-voting technical members to provide subject-matter expertise in areas such as affordable housing finance, development, lending, supportive housing, homelessness services, tenant protections, and related fields. Technical members serve in an advisory capacity and do not vote.

RECOMMENDATION:

Staff recommends the board approve the appointment of Fritz Huber and Jonathan Mendelson as non-voting technical members of the San Joaquin Regional Housing Fund Advisory Committee.

FISCAL IMPACT:

None.

BACKGROUND:

A housing needs assessment, conducted during the feasibility stage of establishing the housing fund, identified the importance of a coordinated regional approach to addressing affordable housing challenges in the San Joaquin region. In line with that recommendation, in September 2025, the San Joaquin Regional Housing Fund Inc. (SJRFH Inc.) Board approved the formation of an advisory committee to guide implementation of the regional housing fund. The committee is expected to provide input on project funding recommendations, program design, and long-term planning.

The HFC has a 12-member structure, including one voting appointment from each of the eight cities and the County, plus up to three non-voting technical advisors representing fields such as housing finance, development, and nonprofit/community expertise. Terms will be staggered initially, transitioning to four-year terms thereafter.

The role of technical members is to supplement the expertise of the HFC with specialized technical knowledge to support committee deliberations. Areas of expertise previously identified include affordable housing finance, development, lending, supportive housing, homelessness services, tenant protections, or related fields. Technical members do not vote. Recommendations are made by the HFC voting members then considered by the SJRFH Inc. board for approval.

COMMITTEE ACTIONS:

Housing Fund Advisory Committee: At its March 2026 meeting, the members reviewed a slate of six candidates to fill the remaining two technical advisor positions and recommended the appointment of:

- Fritz Huber, Senior Vice President at Grupe Huber Company, bringing expertise in real estate development, project finance, asset management, and regional investment.

- Jonathan Mendelson, Executive Director of Central Valley Low Income Housing Corporation (CVLIHC), bringing expertise in permanent supportive housing development, homelessness services, and implementation of state housing programs such as Project Homekey.

NEXT STEPS:

Upon board approval, staff will update HFC membership records and materials accordingly. The first meeting for the two new technical advisors will be April 2, 2026.

ATTACHMENTS:

1. HFC Technical Advisory Candidate Biographies

Prepared by: Joann Martinez, Associate Regional Planner.

Technical Candidate #1
Fritz Huber, Vice President Grupe Huber

Area of expertise: *Real Estate Development / Project Finance / Asset Management / Regional Investment / Public-Private Partnerships*



- Real Estate Development: Senior Vice President, Grupe Huber Company
- Regional Development Experience: Oversees acquisitions, development, and asset management across the Central Valley and Northern California
- Project Leadership: Led \$900M+ in real estate acquisitions and developments
- Local Investment: Projects include retail, mixed-use, and residential development in Stockton and Manteca
- Focus Areas: Real estate development, project finance, asset management, regional investment.

Technical Candidate #2

Jonathan Mendelson, Executive Director of Central Valley Low Income Housing Corporation (CVLIHC)

Area of expertise: *Permanent supportive housing development and operations / Project Homekey and state housing programs / Homeless housing partnerships and service coordination / Local housing implementation in San Joaquin County.*



- Local Knowledge: Stockton native with strong ties across San Joaquin County
- Housing Leadership: Executive Director, CVLIHC (since 2022)
- Project Homekey Experience: Led development of the county's first permanent supportive housing project
- Regional Partnerships: Works with Housing Authority and County agencies on supportive housing
- Focus Areas: Homelessness services, supportive housing development, nonprofit leadership

AGENDA ITEM **4H**



March 2026
SJRHF, Inc.

STAFF REPORT

SUBJECT: Approval of San Joaquin Regional Housing Fund Draft Project Scoring Criteria

RECOMMENDED ACTION: Approve Project Scoring Criteria for First Round of Project Funding for the San Joaquin Regional Housing Fund

DISCUSSION:

SUMMARY:



The purpose of the San Joaquin Regional Housing Fund (SJRHF) is to provide planning, financing, and other tools to help the San Joaquin Council of Governments (SJCOG) member agencies in their efforts to increase housing opportunities for extremely low-, very low-, low-, and moderate-income households throughout San Joaquin County.

SJRHF staff are presenting draft project scoring criteria for review and consideration of approval by the SJRHF Board. These criteria provide an objective method to select projects to fund in this inaugural round of project funding for the SJRHF. The criteria presented are consistent with the SJRHF's purpose and requirements, as well as those of individual funding sources. Projects considered for the current round of project funding have been submitted on a rolling basis for inclusion on the housing fund project pipeline and have been vetted against minimum threshold criteria for the various funding sources. Each project will have to demonstrate local support as a condition of funding.

A summary of the proposed scoring criteria is below, additional information is in the background section of the staff report.

Scoring Criteria	Total Point Value
Project type (new construction and rental preferred)	30
Readiness to close financing and begin construction	20
Number and percentage of units affordable for households with 30% or less of Area Median Income (AMI)	20
Efficient use of SJRHF funds (i.e., a low per-unit funding request)	15
Geographic distribution throughout San Joaquin County	15
TOTAL	100

The SJRHF has approximately \$13 million initially available and has identified a pipeline of proposed affordable housing developments through coordination with member jurisdictions and developers. Currently active funding requests in the pipeline total more than \$42 million. These draft scoring criteria were reviewed and approved by the Housing Fund Advisory Committee (HFC) at their March 2026 meeting. Staff have incorporated the HFC's input on the draft scoring criteria and are now presenting them for action by the board of directors.

RECOMMENDATION:

Staff recommends that the SJRHF Inc. Board approve the San Joaquin Regional Housing Fund draft project scoring criteria, which has incorporated feedback provided by the HFC.

FISCAL IMPACT:

While the development of the scoring criteria does not have a direct fiscal impact, the further actions of allocating the available funding to projects will result in the expenditure of up to \$13 million in available project funding – subject to further board action.

BACKGROUND:

In September 2024, the SJRHF applied to the state Local Housing Trust Fund (LHTF) program. The LHTF program competitively awards funds that local and regional housing trusts commit to affordable housing development. The SJRHF's LHTF application was successful and resulted in an award of \$5,000,000 in September 2025 to fund affordable housing development in San Joaquin County. As required by the LHTF program, SJCOG committed \$5,000,000 in local matching funds. The local match is from the Measure K Smart Growth Incentive Program.



In February 2026, the SJRHF received an additional commitment of \$3,000,000 from HealthNet, a healthcare insurance provider, to fund affordable housing development. These funds are more flexible than the LHTF and Measure K sources and therefore have the potential to help support projects not otherwise qualifying under the stricter guidelines for these fund sources.



In preparation for the LHTF application and to maximize its competitiveness, the SJRHF coordinated with member jurisdictions to create a project pipeline consisting of proposed affordable housing developments. The SJRHF consultants Harris & Associates took the lead to review information regarding these developments and to communicate with the affordable housing developers to verify information, to gather additional information, to update the pipeline as needed, and to conduct due diligence on behalf of the SJRHF prior to committing funds to specific developments. Harris & Associates worked with staff to prepare scoring criteria to rank the developments in the pipeline for the allocation of funding.

Project Eligibility & Initial Submission Requirements

To be considered for the SJRHF project pipeline, developers must submit basic project information showing that the project meets key program priorities. This includes a brief project description, site details (address or APN), unit mix, target population, funding request, and a general development timeline.

As a threshold requirement, applicants must demonstrate local jurisdiction support. Projects without jurisdictional support will not be considered for funding. Beyond threshold eligibility, projects are evaluated based on how well they align with available SJRHF goals and funding requirements.



Projects in the pipeline are then scored using the SJRHF's scoring criteria. This provides an objective method to prioritize which developments to fund while balancing the SJRHF's purpose, the LHTF program requirements and restrictions, as well as opportunities for the SJRHF to maximize its impact and support for affordable housing development. These scoring criteria will apply to the initial funding available to the SJRHF. Future funding may be subject to different program requirements.

Draft San Joaquin Regional Housing Fund Project Scoring Criteria

The draft project scoring criteria reflect the priorities established by the LHTF program, the Measure K Smart Growth Incentive Fund requirements, and the HealthNet funding conditions. Additional criteria may be applied based on the requirements and restrictions of funding sources.

The SJRHF staff proposes prioritizing affordable housing developments for funding from its project pipeline based on the following criteria:

Scoring Criteria	Description	Total Potential Value
Project type (new construction and rental preferred)	Full points for new construction, rental development (as defined in LHTF Guidelines). Reduced points for acquisition & rehabilitation and nonrental projects.	30
Readiness to close financing and begin construction	Project readiness will consider progress on entitlement and building permits, as well as any required environmental review. Full points for expected construction start within 6 months of application. Reduced points for expected construction start between 6 to 12 months of application. Further reduction for expected construction start after 12 months of application.	20
Number and percentage of units affordable for households with 30% or less of Area Median Income (AMI)	Full points if $\geq 30\%$ of units and ≥ 15 units at or below 30% of AMI. Reduced points if 10%-30% of units and 5-14 units are at or below 30% of AMI. Further reductions for less than 10% and 0% of units and for less than 5 units at or below 30% of AMI.	20
Efficient use of SJRHF funds (i.e., a low per-unit funding request)	Full points for requests of \$50,000 or less per unit. Reduced points for request of \$50,000 to \$100,000 per unit. Further reductions for requests of more than \$100,000 per unit and more than \$200,000 per unit.	15
Geographic distribution throughout San Joaquin County	Points awarded to the highest-scoring project within each city to encourage equitable geographic distribution of funds across San Joaquin County. The highest-scoring project is determined based on the cumulative evaluation score under the other adopted scoring criteria.	15
TOTAL		100

After scoring, the top-ranked projects are reviewed to verify alignment with applicable funding requirements. For example: in this funding round, these would be Measure K goals, which emphasize promoting infill development, supporting walkable and transit-supportive communities, and encouraging housing and mixed-use development in urbanized areas. Under LHTF requirements for the SJRHF, only new construction and permanent, rental housing projects are eligible, as opposed to acquisition/rehabilitation, ownership, or transitional housing.

COMMITTEE ACTIONS:

San Joaquin Regional Housing Fund Inc Advisory Committee (HFC):

- Members identified local support as a threshold requirement for funding eligibility
- Members approved the draft scoring criteria with direction to staff to include the following under “Project Readiness”:
 - Entitlement status/building permits,
 - Environmental review progress, and
 - More flexible readiness timeframe, such as projects “expected to start construction within 6 months of funding decision”

NEXT STEPS:

The schedule and key milestones for awarding SJRHF’s first round of funding are outlined below.

March 2026	Approval of Draft Regional Housing Fund Project Scoring Criteria
April – June 2026	Overview of Regional Housing Fund Project Pipeline & Project Selection for Round 1 Funding

Prepared by: Christine Corrales, Planning Manager; Kim Anderson, Deputy Director of Planning

AGENDA ITEM 4I



March 2026
SJCOG, Inc.

STAFF REPORT

- SUBJECT:** Approval of the SJ River Club Monopole Project Plan Participation
- RECOMMENDED ACTION:** Motion to Approve Recommendation to SJCOG, Inc. to Allow the SJ River Club Monopole Project to Participate in the SJMSCP
- DISCUSSION:**
- SUMMARY:**



The project applicant, Vertical Bridge, is requesting coverage under the San Joaquin Multi-Species Habitat Conservation and Open Space Plan (SJMSCP or Plan) through the San Joaquin County Community Development Department because the project is in an unmapped area of the Plan. The site is located at the northeast corner of Kasson Road and E. Durham Ferry Road, east of the City of Tracy in the Central Zone (attachments 1 & 2).

RECOMMENDATION:

SJCOG, Inc. staff and the Habitat Technical Advisory Committee (HTAC) make the recommendation to the SJCOG, Inc. Board to allow the SJ River Club Monopole Project to participate in the SJMSCP to provide biological coverage for the project impacts to the habitat types under the federal and state permits.

FISCAL IMPACT:

If this project is approved, SJCOG, Inc. will be provided with mitigation for the project impacts as required under the SJMSCP for approximately 0.50 acres. The impacts for this project would consist of 0.50 acres of Urban (U) habitat impacts. There are no fees for Urban (U) impacts.

Habitat Classification:

Habitat Type	Total Acres	2026 Fee/Acre	2026 Total Fee
Urban (U)	0.50	\$0.00	\$0.00
Total:	0.00		\$0.00

BACKGROUND:

This project consists of an administrative use permit application for a 100-foot monopole telecommunications tower with related equipment with a 2,046 square foot lease area (attachment 3).

The SJMSCP Geographic Information System (GIS) vegetation map portrays the project site as Urban (U) habitat land.

If allowed to participate in the SJMSCP, the total disturbed area will consist of 0.50 acres of Urban (U) impacts. The project applicant will be responsible for mitigating habitat impacts that are consumed by this project by either paying the appropriate fees at the time of ground disturbance or dedicating land in lieu of a fee at the appropriate SJMSCP ratio. There are no fees for Urban (U) impacts.

**NEXT STEPS:**

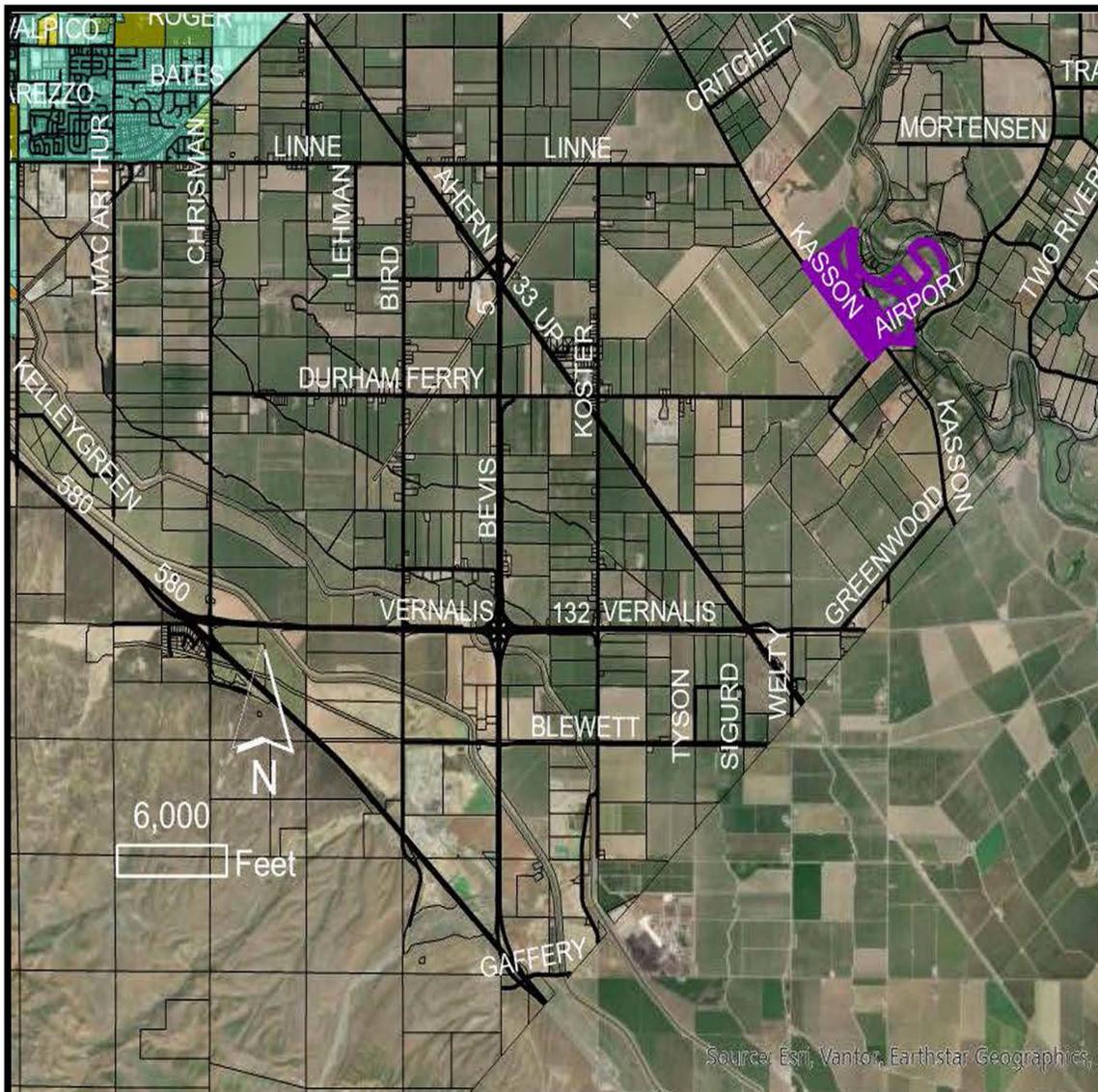
Should the staff recommendations be approved by the SJCOG, Inc. Board at the February 11th SJCOG, Inc. Board meeting, the project will proceed forward under the plan.

ATTACHMENTS:

1. General Location Map
2. Project Site Map
3. Project Site Map

Prepared by: Laurel Boyd, Associate Habitat Planner

ATTACHMENT 1



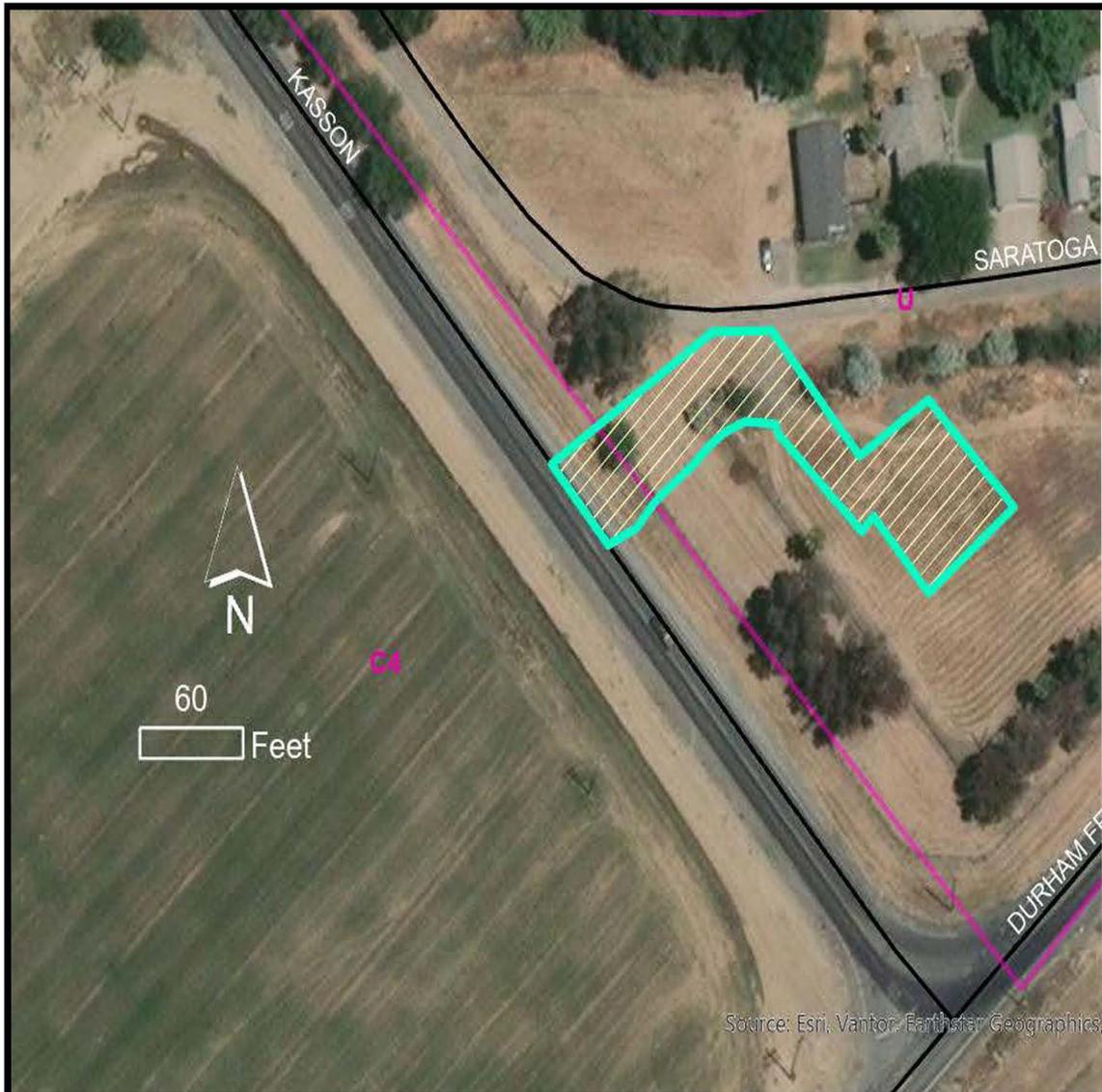
SJ River Club Monopole Project

Legend

-  SJ River Club Monopole Project
- TracyCompMap
- Land_Type
 -  Agriculture
 -  Multi-Purpose Open Space
 -  Natural
 -  Urban



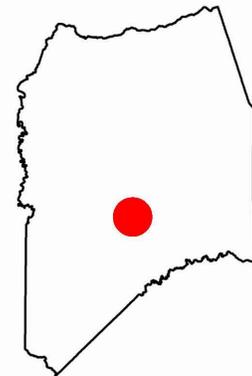
ATTACHMENT 2



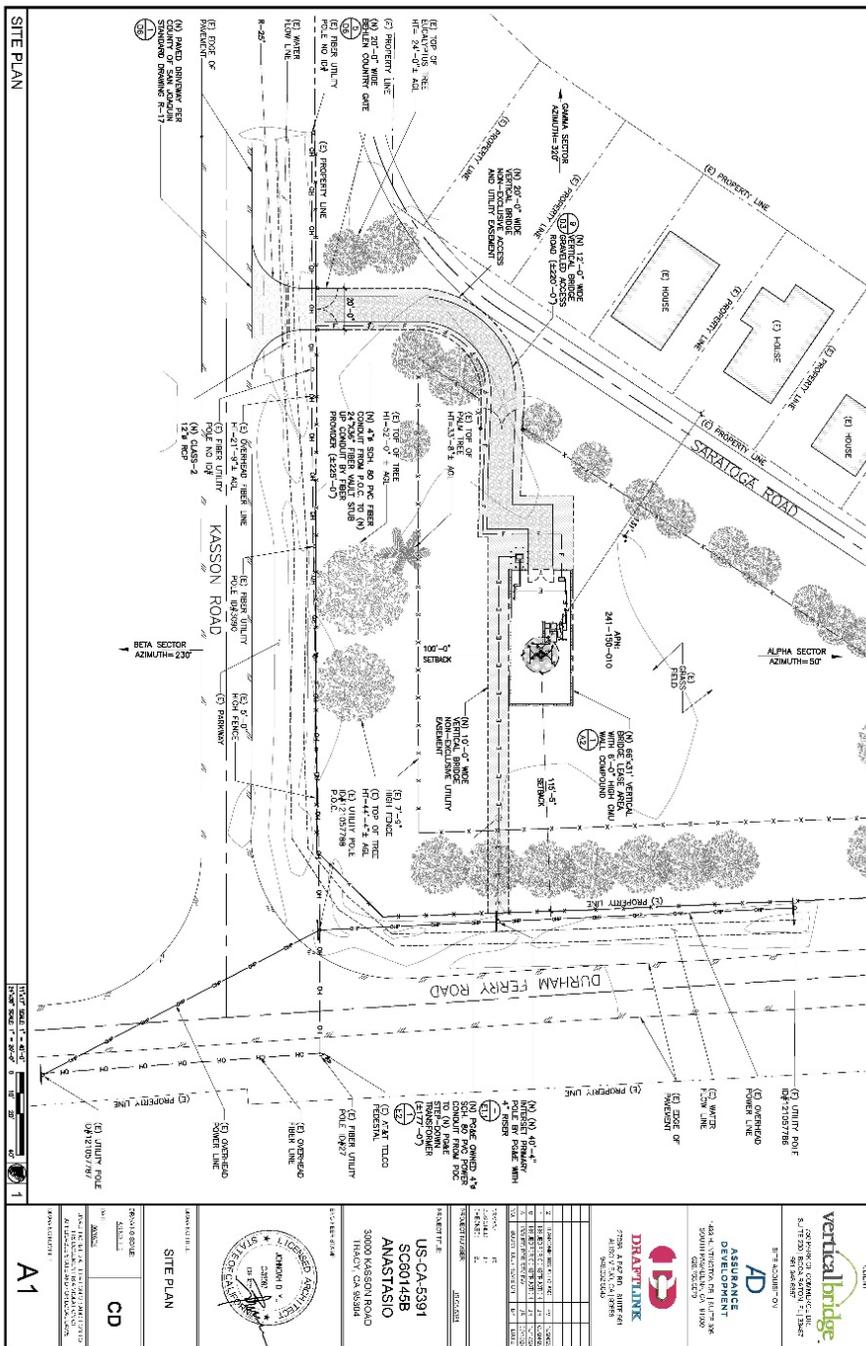
SJ River Club Monopole Project

Legend

-  Project Location
-  Habitat Classification
-  Roads
-  Waterways



ATTACHMENT 3



AGENDA ITEM **4J**



March 2026
SJCOG, Inc.

STAFF REPORT

- SUBJECT:** Approval of the Dry Creek Road Bridge Rehabilitation Project, Plan Participation and Habitat Classification Change
- RECOMMENDED ACTION:** Motion to Approve Recommendation to SJCOG, Inc. to 1) Allow the Dry Creek Road Bridge Rehabilitation Project to Participate in the SJMSCP; and 2) Allow an Alteration to the Habitat Type Coverage from Agriculture (C34) to Urban (U2) Habitat Land

DISCUSSION:

SUMMARY:



The project applicant, San Joaquin County Department of Public Works, is requesting coverage under the San Joaquin Multi-Species Habitat Conservation and Open Space Plan (SJMSCP or Plan) because the project is in an unmapped area of the Plan. Concurrently, the project applicant is requesting that the habitat type be reclassified. Portions of the project were not classified correctly at the inception of the SJMSCP when mapping the habitat classifications for the entirety of San Joaquin County. The project can come to the Habitat Technical Advisory Committee (HTAC) to request a change in the habitat classification using Geographical Information Systems (GIS) from the inception of the Plan (2001-2002) to reclassify or correct the project's habitat classification. The project site is located north of Liberty Road and east of Elliot Road, north of the Community of Clements in the Vernal Pool Zone (attachments 1 & 2).

RECOMMENDATION:

SJCOG, Inc. staff recommends the Habitat Technical Advisory Committee (HTAC) recommend to the SJCOG, Inc. Board to:

- 1) Allow the Dry Creek Road Bridge Rehabilitation Project to participate in the SJMSCP to provide biological coverage for the project impacts to the habitat types under the federal and state permits; and
- 2) Allow an alteration to the habitat type coverage from Agriculture (C34) to Urban (U2) habitat land.

FISCAL IMPACT:

If this project is approved, including the habitat type coverage alteration, SJCOG, Inc. will be provided mitigation for the project impacts as required under the SJMSCP for approximately 0.93 acres. The impacts for this project would consist of 0.93 acres of Urban (U2) habitat impacts. Should the project mitigate for project impacts by paying the 2026 fee, the project would be responsible for mitigating the following fee calculation:

Original Habitat Classification:

Habitat Type	Total Acres	2026 Fee/Acre	2026 Total Fee
Agriculture (C34)	0.93	\$17,868	\$16,617.24
Total:	0.93		\$16,617.24

Recommended Habitat Classification Change:

Habitat Type	Total Acres	2026 Fee/Acre	2026 Total Fee
Urban (U2)	0.93	\$0.00	\$0.00
Total:	0.93		\$0.00

Should the project impacts occur in a later calendar year, the fee in place at the time of the impact would apply.

BACKGROUND:



This project consists of replacing the existing Dry Creek Road Bridge along Dry Creek Road. The County will remove the existing 21' timber structure over the North Fork of Coyote Creek. The replacement bridge will have three Reinforced Concrete Pipes (RCPs). Three rows of 60" RCP, each 32 feet long and composed of 8-foot segments, will be installed in the channel. RSP will be placed at the upstream and downstream ends of the RCPs with native material and aggregate base on top of the pipes. These RCPs will be reinforced with RSP to reduce flow velocity and prevent excessive erosion within the existing drainage during large storm events. Any timber elements of the existing bridge in good condition will be salvaged.

Access across the Dry Creek Road bridge will be closed during construction. A detour along Jack Tone Road (one mile west of the project) will be available to accommodate access to Dry Creek Road north of the bridge rehabilitation site. The project will be staging construction along Dry Creek Road (attachment 3).



The Dry Creek Road Bridge Rehabilitation project will seek outside permitting needs for impacts within Coyote Creek with the following agencies:

- California Fish and Wildlife Department - Section 1602 Streambed Alteration Agreement
- Central Valley Regional Water Quality Control Board - Section 401 Permit
- Army Corps of Engineers - Section 404 permit Nationwide Permit
- United States Fish and Wildlife Service – Section 7 Consultation

Habitat Classification Change

In accordance with the SJMSCP Planned Land Use Map, the project site is located in the “unmapped” land use area of the plan. Because it is not located on a SJMSCP compensation map, the project can request an alteration to the SJMSCP vegetation map habitat classification on a case-by-case review.

The project is seeking an alteration to the habitat classification on the SJMSCP vegetation map. Per the SJMSCP’s Section 8.8.2.1, a project can seek an alteration to the habitat classification by providing aerial photography imagery dated prior to SJMSCP permit issuance in 2001. Each project will be reviewed by the HTAC for recommendation to the SJCOG, Inc. Board for approval on a case-by-case basis. The original SJMSCP GIS vegetation map portrays the project site was classified as:

- Agricultural (C34) habitat land, where it should be Urban (U2) consisting of the existing road – Dry Creek Road.

The 2001 aerial (attachment 4), which shows a broader review of the habitat types in San Joaquin County, shows portions of the land within the project footprint as Urban (U2) habitat consisting of the existing road – Dry Creek Road. The original SJMSCP habitat classification for this specific area would be re-classified from 0.93 acres of Agriculture (C34) habitat land to 0.93 acres of Urban (U2) habitat land.

Original Classification	Original Acres	Reclassified Acres
Agriculture (C34)	0.93	0.00
Urban (U2)	0.00	0.93
Total		0.93

NEXT STEPS:

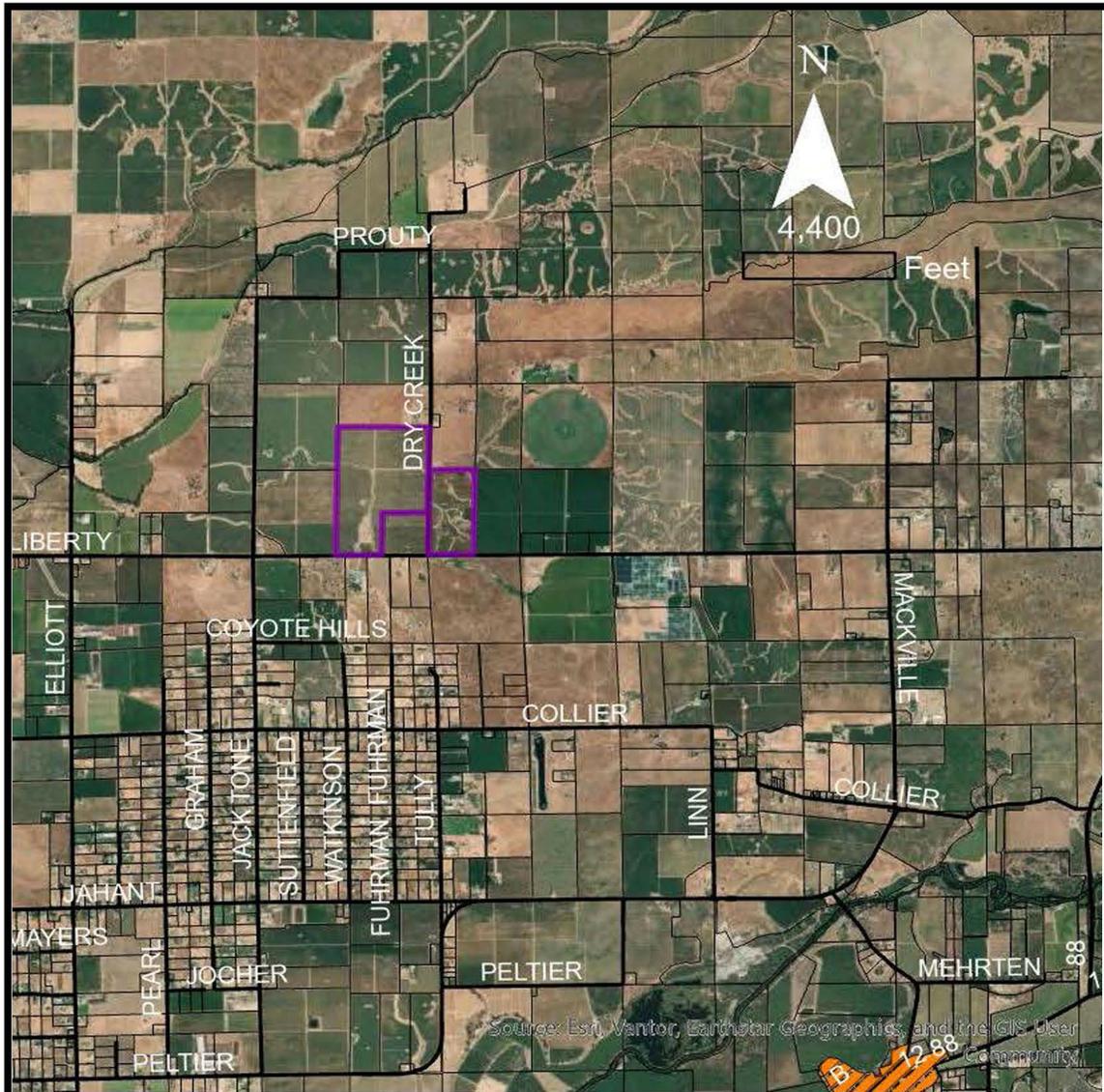
Should the staff recommendation be approved by the SJCOG, Inc. Board at the March 26th SJCOG, Inc. Board meeting, the project will proceed forward under the plan.

ATTACHMENTS:

1. General Location Map
2. Project Site Map
3. Project Site Map
4. 2001-02 Aerial Imagery

Prepared by: Laurel Boyd, Associate Habitat Planner

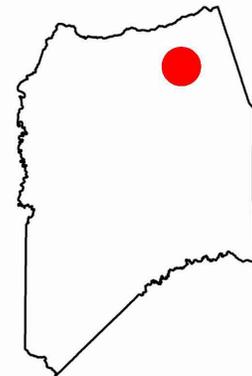
ATTACHMENT 1



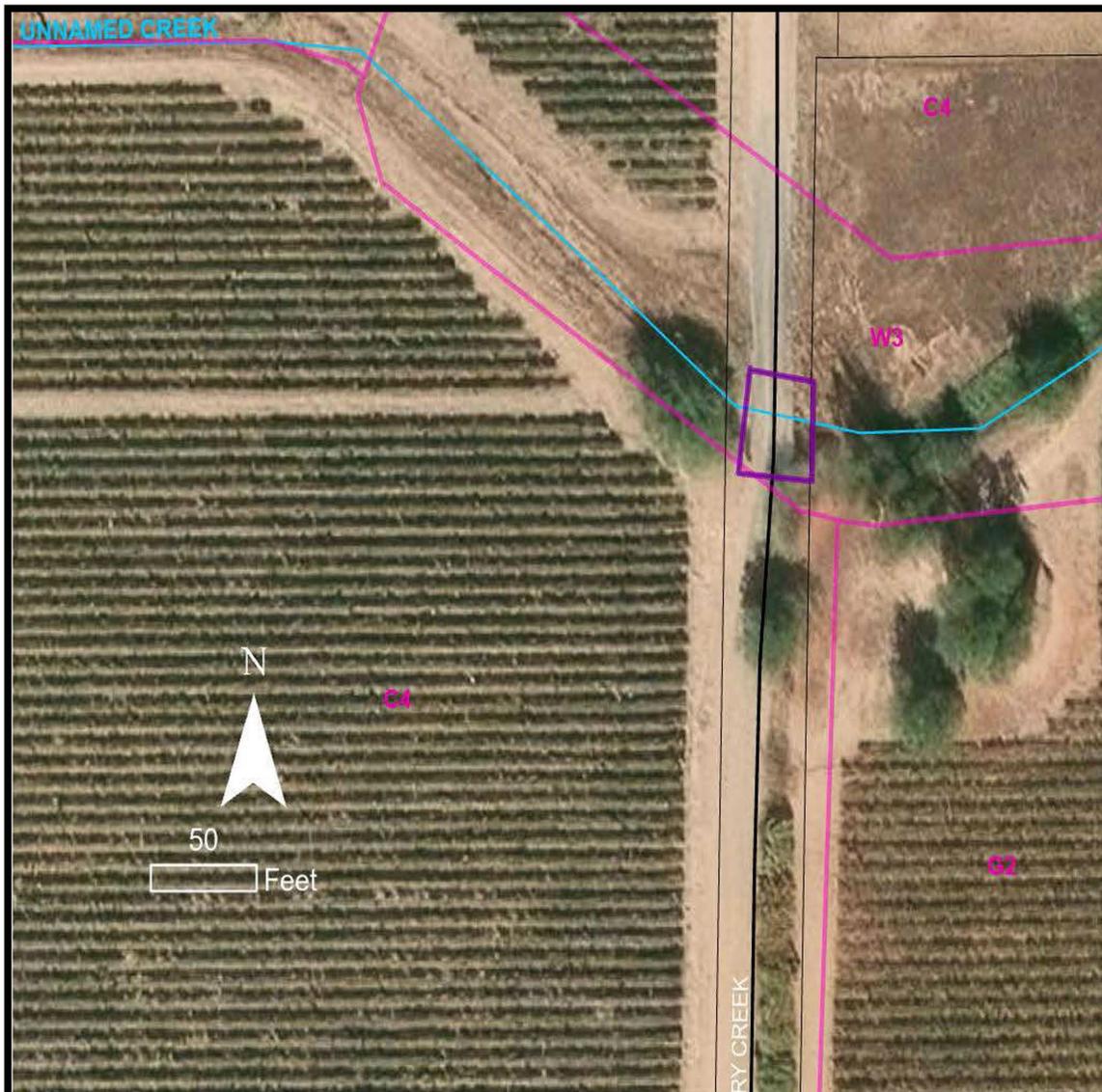
Dry Creek Road Bridge Replacement Project

Legend

-  Dry Creek Road Bridge Replacement Project
-  CLEMENTS



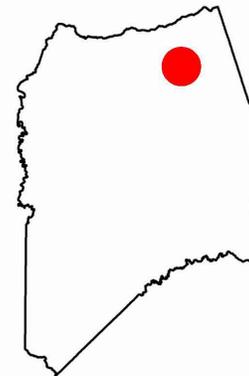
ATTACHMENT 2



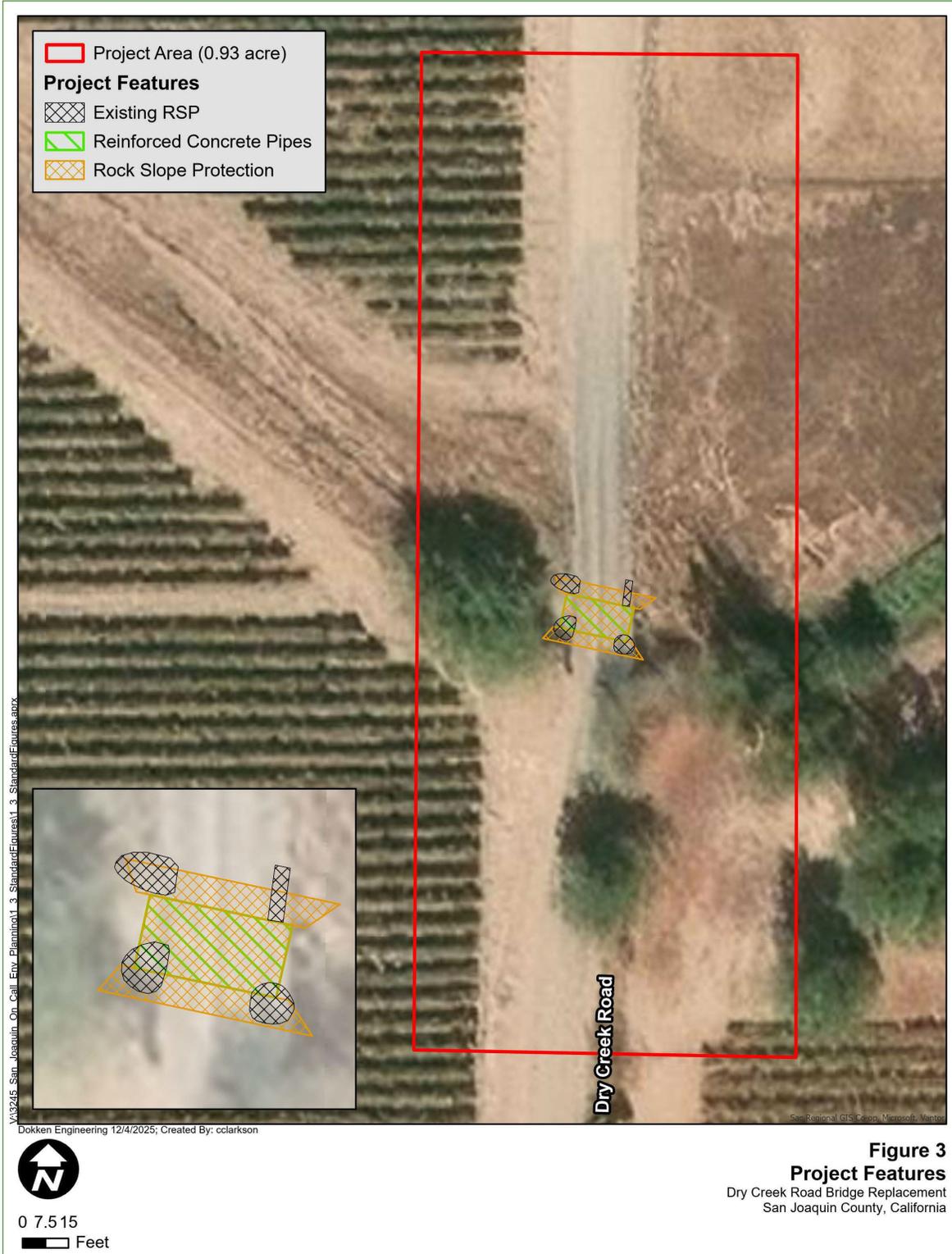
Dry Creek Road Bridge Replacement Project

Legend

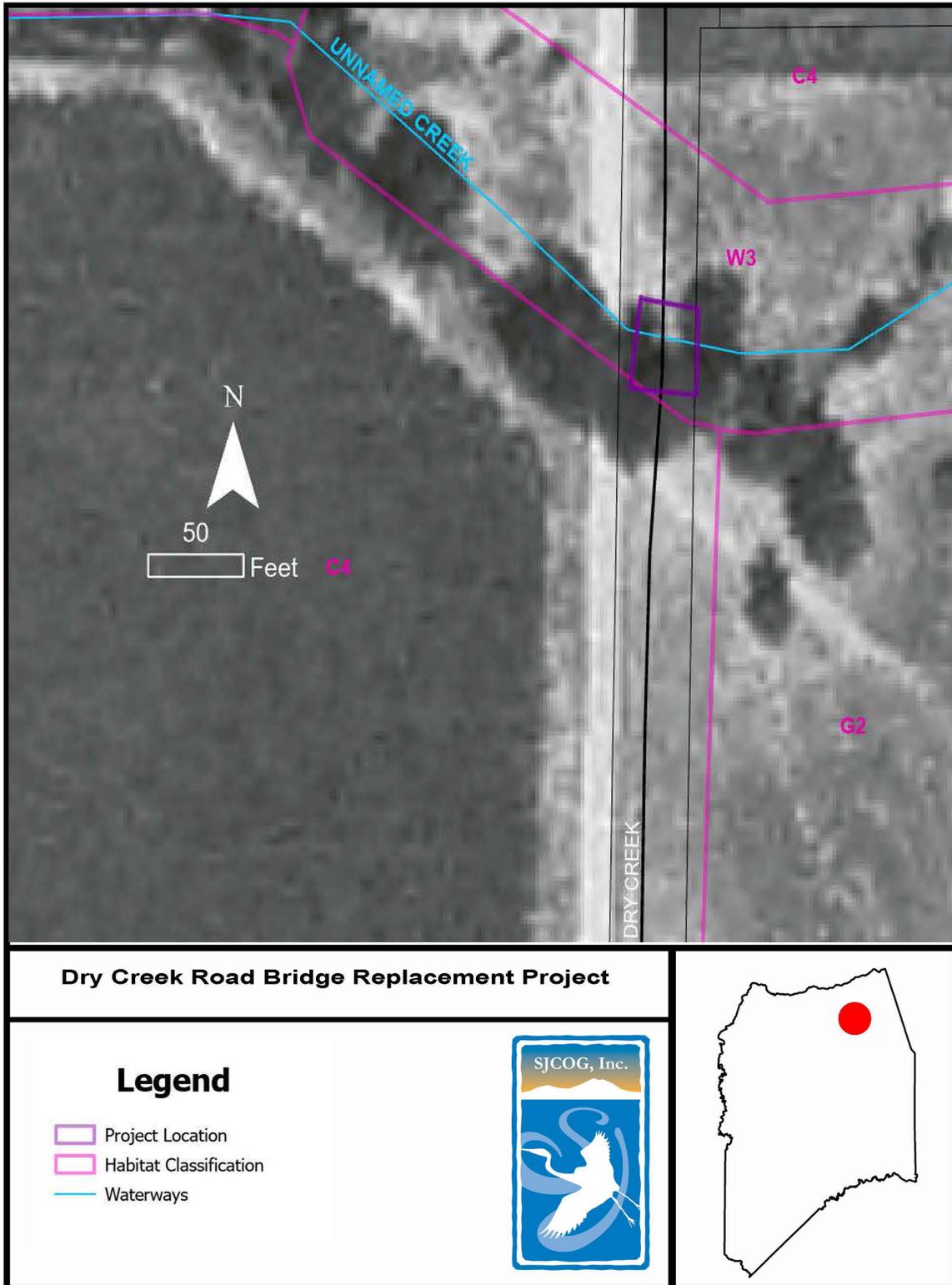
-  Project Location
-  Habitat Classification
-  Waterways



ATTACHMENT 3



ATTACHMENT 4



AGENDA ITEM **4K**



March 2026
SJCOG, Inc.

STAFF REPORT

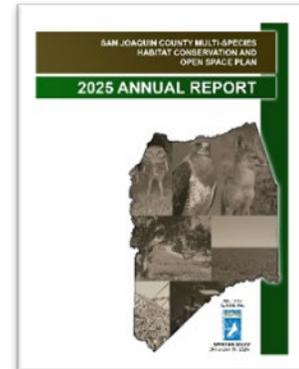
SUBJECT: 2025 San Joaquin Multi- Species Habitat Conservation and Open Spaces Plan Annual Report Release

RECOMMENDED ACTION: Approval to Release the 2025 SJMSCP Annual Report to Permitting Agencies

DISCUSSION:

SUMMARY:

In accordance with Section 5.9.1 of the San Joaquin County Multi-Species Habitat Conservation and Open Space Plan (SJMSCP), SJCOG, Inc. is required to submit an *Annual Report* to the permitting agencies for the purpose of reporting acreage, type, and location of open space uses that are converted to non-open space uses, and an accounting of preserve acres acquired pursuant to the SJMSCP. Through a clerical change in the SJMSCP in May 2006, the report must be submitted by April 1st of the year succeeding the calendar year in which the activities were conducted. The *2025 SJMSCP Annual Report* is a draft document which covers activities from January 1, 2025, to December 31, 2025.



RECOMMENDATION:

Approval to release the 2025 SJMSCP Annual Report to the permitting agencies.

FISCAL IMPACT:

None.

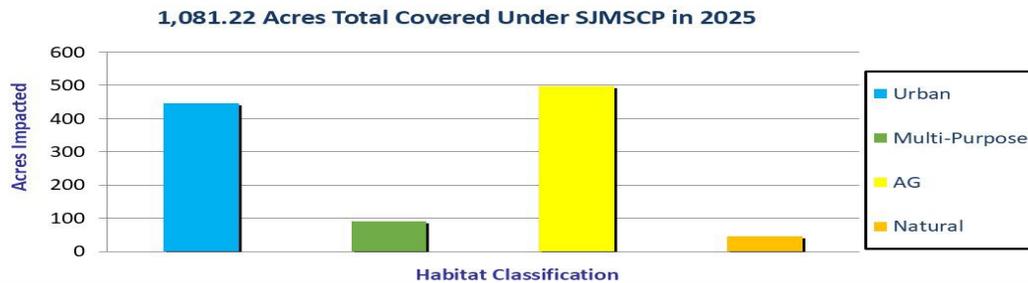
BACKGROUND:

An executive summary of the 2025 SJMSCP Annual Report is provided as an attachment to the staff report. The entirety of the 2025 SJMSCP Annual Report and preserve monitoring photo station can be requested in electronic format or found on the SJCOG website Habitat Plan Documents page (<https://www.sjco.org/173/Plan-Documents>) under the Plan Documents & Resources section. The report is complete

including all the reported calendar year acreage counts from the jurisdictions. The information in this report reflects accounting and activity that has been reported to staff through December 31, 2025.

There were minimal comments provided to staff on the initial draft reviewed by HTAC from the February 2026 meeting to include in the final version for the March 2026 HTAC meeting.

The following graphic is a summary of the various tables and important matters discussed in the annual report, including current year development impacts, carry-over mitigation, current mitigation due in 2025 from 2023 projects, acquisitions of mitigation land, and funding.



491.18 acres acquired

- 466.18 acres Agricultural Habitat**
- 17.3 acres Grassland Habitat**
- 4.2 acres Canal Habitat**
- 3.5 acres Ditch Habitat**

SJMSCP conserved lands = 24,776.58 acres







Habitat Acreage Impacts (Tables 9 – 13)

- Agricultural: 988.631 acres for future mitigation (Delta and Central Zones)
- Grasslands: 389.17 acres for future mitigation (Central and Southwest Zones)
- Natural Riparian: 51.25 acres for future mitigation (Central Zone)
- Vernal Pool Grasslands: 71.65 acres for future mitigation (VP Zone)
- Misc. Habitat Types: 200 +/- acres – Deferred Mitigation (All Zones)
 *Deferred Mitigation = mitigation acres still owed



2025 SJMSCP Funding (Table 16 and 17)

\$25,426,436.74 General Fund Available

\$68,929,705.88 Preserve Endowment

\$6,748,851.03 Post Permit Funds

If the SJCOG, Inc. Board approves the release to the permitting agencies, staff would expect a joint comment response from USFWS and CDFW in July or August 2026. Those comments will be addressed in the yearly meeting with USFWS and CDFW to be scheduled after the review is complete.

COMMITTEE ACTIONS:

Habitat Technical Advisory Committee (HTAC): Recommend Approval
Management & Finance: Information
Exec Committee: Information

NEXT STEPS:

Should the staff recommendation be approved by the SJCOG, Inc. Board at the March 2026 Board meeting, the report will be sent to both permitting agencies.

ATTACHMENTS:

1. Executive Summary 2025 SJMSCP Annual Report

Prepared by: Steven Mayo, Program Manager

Attachment 1

2025 SJMSCP Annual Report - Executive Summary

The 2025 San Joaquin County Multi-Species Habitat Conservation and Open Space Plan (SJMSCP) Annual Report is provided to meet the annual reporting requirement that is established in Section 5.9.1 of the SJMSCP. The intent of the Annual Report is to focus on the acreage, type, and location of open space use converted to non-open space use, and the accounting of preserve acres acquired pursuant to the SJMSCP.

The Annual Report is comprised of four main sections: Conversions (Development), Conservation (Preserves), Funding, and SJMSCP Implementation. The Conversions section provides detailed information for projects that have participated in the SJMSCP. Such information includes habitat conversion type, impacts to SJMSCP Covered Species, and habitat mitigation requirements. The Conservation section will discuss preserve acquisitions in 2025 and provides information regarding the preserve jumpstart requirements. The Funding section details the revenues and expenditures for the reporting period. The SJMSCP Implementation section provides information regarding the overall implementation of the SJMSCP.

1. Conversions (Development Activity)

In 2025, the total number of acres covered overall by the SJMSCP was **1,081.22 acres**. Of the overall impacts covered, **446.51 acres** were urban habitat, which required biological compliance but were exempt from mitigation requirements (fees or land dedication). The total number of acres subject to fee assessment covered by the SJMSCP was **634.71 acres** broken down into the following habitat classifications: **90.89 acres** of multi-purpose habitat, **497.22 acres** of agricultural habitat, and **46.60 acres** of natural habitat. The agricultural habitat category was the largest habitat type converted for development during the year.

The total of **497.22 acres** of agricultural habitat land represents approximately **45.99%** of the overall cumulative SJMSCP coverage for all habitat types in 2024 and approximately **78.33%** of the impact acres that required fees associated under the plan. The predominant covered projects participating in the SJMSCP for 2025 were residential and commercial development projects.

2. Conservation (Preserves)

In 2025, SJCOG, Inc. acquired an additional **491.18 acres** of land placed under conservation from 4 land transactions to meet mitigation needs of the SJMSCP. The makeup of the acreage acquired over the reporting period was three (3) easement purchases and one (1) dedication. The conserved land consisted of **17.3 acres** of grassland in the Southwest Zone, **4.2 acres** of canal habitat in the Delta Zone, **3.5 acres** of ditch habitat in the Delta Zone and **466.18 acres** of row and field crop habitat in the Central Zone and Delta Zone.

Overall, the SJMSCP preserve system consists of **24,776.58 acres** including carried-over surplus mitigation holdings and unfulfilled mitigation in some categories which will be addressed in the future.

Table 13: Final 2025 Mitigation after SJCOG, Inc. Preserves and Banked Preserve Allotment

TYPE OF LAND	Central	Cen/SW	SW	Delta	Vernal Pool
Row & Field Crops (C34)	0.080	0.000	0.000	988.551	0.000
Ruderal (C5)	0.000	0.000	0.000	0.000	0.000
Drainage Ditch (D)	57.060	0.000	0.000	3.500	0.000
Valley Grasslands (G)	76.750	0.000	312.420	24.700	0.000
Foothill Grasslands (G2)	0.060	0.000	0.000	0.000	0.000
Vernal Pool Grasslands (G3)	0.000	1.170	0.000	0.000	71.655
Great Valley Riparian Forest (R)	51.250	0.000	0.000	0.110	0.000
Great Valley Oak Riparian Forest (R2)	0.000	0.000	0.000	0.000	0.000
Mixed Oak Savanna (O/G)	7.130	0.000	0.000	0.000	0.850
River/Deep Water Channel (W)	0.000	37.860	0.120	0.000	0.000
Creek (W3)	0.390	16.220	4.830	0.000	0.000
Dead-End Slough (W4)	0.070	0.000	0.000	0.000	0.000
Freshwater Lake, Pond or Vernal Pool (W5)	0.000	5.890	0.210	0.000	0.000
Freshwater Emergent Wetland (W7)	0.000	0.000	0.000	0.000	0.000
Vernal or Seasonal Wetland (W8)	0.000	17.030	0.050	0.000	0.000
Canal (W9)	5.960	1.680	0.000	4.200	0.000
Valley Oak Forest (V3)	12.580	0.000	0.000	0.000	0.000
Valley Oak Savanna (V)	9.000	0.000	0.000	0.000	0.000

3. Funding

The revenues and expenditures that occurred for the Calendar Year 2025 include payments of SJMSCP mitigation fees, other revenues (e.g., accumulated interest remitted and SJCOG, Inc. account accumulated interest) and expenditures related to the plan. At the end of 2025, the revenues were **\$15,265,502** (consisting of \$9,852,333 in fees, \$165,068 as charitable contribution, \$465,803 in land-in-lieu and \$4,782,298 in earnings on investments) while the overall disbursements were **\$4,991,425** in 2025.

For reporting in 2025, the advised changes made from the Financial Analysis 5-Year Review (2020 & 2025) adopted by SJCOG, Inc. as described in bullet point below were completed. The primary changes were the continuation of fund balance being tracked in three components for compliance with the Mitigation Fee Act. These components include (1) new endowment fund balance, (2) remaining one-time enhancement costs for existing preserves, and (3) remaining ongoing Category A and C costs for the remainder of the permit term.

During the 5-Year Review of 2020 and 2025, it was determined annual transfer of funds related to the Land Management/Enhancement Trust Funds should not have included Category C in the per acre transfer. Staff had assumed Category C component of the fee was to be put aside in the Land Management/Enhancement Trust funds from the original 2007 update. In actuality, the Category C component was not to be transferred into the trust funds. In 2025, the completion of the funds was moved back. The transfer calculation was corrected to remove Category C component by staff.

- 2020 correction (2007-2020 = \$12.1 million)
- 2025 correction (2021-2025 = \$ 4.5 million)

The end of calendar year balances the three funding silos under the habitat plan with all the recommended changes adopted from the financial analysis:

- 1) SJCOG, Inc Fund Balance of **\$25,426,436.74** (with most related to the Category C funds transferred back from 2020/2025 Financial Analysis change)
- 2) Land Management/Enhancement Funds of **\$68,929,705.88**
(MGMT/ENHNCMT = \$4,672,041.96 + \$64,257,663.92)
- 3) Post Permit Funds of **\$6,748,851.03**

4. Implementation

In the 2025 calendar year, SJCOG, Inc. staff worked on various matters under the SJMSCP including:

1. SJMSCP CDFW CEQA Fees
2. Project Compliance Issues
3. San Joaquin County Agricultural Building Permit Processing
4. Bay Delta Conservation Plan (BDCP) and Delta Stewardship Council
5. Fee Collection for the City of Stockton
6. Date-Certain Mitigation / 500 Acre Cap Calculations
7. Project permitting by Jurisdictions Outside the SJMSCP

AGENDA ITEM **5A**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Approval of Senate Bill 125 Phase 2 Programming Recommendations

RECOMMENDED ACTION: 1) Approval of Senate Bill 125 Phase 2 Programming Recommendations identified in Attachment A, and 2) Authorize the Executive Director to Execute Fund Transfer Agreements with the Respective Agencies

SUMMARY:

In October 2025, the San Joaquin Council of Governments (SJCOG) Board approved the SB 125 Phase 2 program guidelines and released a call for projects. Phase 2 consists of the unprogrammed balance of \$25.663 million for Years 3 and 4 of SJCOG's SB 125 Program allocation. This funding is subject to the California State Transportation Agency (CalSTA) releasing the Year 3 and 4 funds to SJCOG.

In addition to the guidelines and call for projects, an ad hoc committee of 3 voting SJCOG Board members was chosen by the SJCOG Chair to review the applications and make a recommendation based on the SJCOG Board approved criteria of project readiness, regional benefit, other committed funding, community support, and previous SB 125 funding.

Applications were due January 31, 2026. SJCOG received 17 applications totaling \$33,365,000. The SB 125 Phase ad hoc committee has developed a programming recommendation shown in Attachment A, totaling \$25,125,000 be funded through this program.

RECOMMENDATION:

Approve of the ad hoc committee's recommendation for SB 125 Phase 2 programming, as shown in Attachment A, totaling \$25,125,000, and authorize the executive director to execute fund transfer agreements with the awardees identified in Attachment A.

Note that the Executive Committee received a request from the City of Ripon to combine their two projects into one project. Ripon would still be purchasing two buses for their transit fleet (with a scope change of two CNG buses) and a compressed natural gas compressor, not to exceed their original combined SB 125 funding request. This was deemed not a material change to the scope and recommended for approval by the Executive Committee.

FISCAL IMPACT:

Board's approval of the recommendation would program \$25,125,000 in SB 125 funds, subject to CalSTA releasing the Year 3 and 4 funds to SJCOG.

COMMITTEE ACTIONS:

Technical Advisory Committee: Unanimously approved.

Management and Finance Committee: Unanimously approved.

Executive Committee: Unanimously approved the recommendation, to include the changes to the City of Ripon's submittal.

ATTACHMENT(S):

Attachment A: Ad Hoc Committee Programming Recommendation

Prepared by: Joel Campos, Senior Regional Planner

Attachment A: Programming Recommendation

Agency	Project Title	SB 125 Phase 2 Ask
City of Escalon	Enhancing Escalon eTrans Experience for Passengers	\$75,000
City of Lathrop	Planning for Transit Operations and Maintenance Facility for Lathrop Transit	\$500,000
City of Lathrop	Purchase Transit Fleet for Lathrop Transit	\$1,300,000
City of Manteca	Manteca Transit Bus Facility	\$1,600,000
City of Ripon	Purchase CNG Compressor and Replacement Transit Fleet for Ripon Blossom Express	\$2,400,000
City of Ripon	Purchase Passenger Amenities	\$50,000
San Joaquin Regional Transit District	VanGo Fleet Replacement Vehicles	\$1,800,000
San Joaquin Regional Transit District	Ticket Vending Machine (TVM) Revenue Vehicle Fleet Upgrades	\$800,000
San Joaquin Regional Rail Commission	Ace Rolling Stock Capital Spares	\$2,000,000
San Joaquin Regional Rail Commission	San Joaquin Street Station Exterior Paint, Striping & Lighting Improvements	\$2,000,000
City of Tracy	Electric Bus Charging Infrastructure	\$200,000
City of Tracy	Transit Maintenance and Storage Facility Design	\$2,000,000
City of Tracy	Zero Emission On-Demand Bus Purchase	\$400,000
Tri-Valley – San Joaquin Valley Regional Rail Authority	Valley Link Rail Project Phase 1A	\$10,000,000

Total SB 125 Phase 2 Programming: \$25,125,000

Projects Not Recommended for Programming

Agency	Project Title	SB 125 Phase 2 Ask
San Joaquin Regional Transit District	RTD Hydrogen Fueling Trailer	\$5,440,000
San Joaquin Regional Transit District	RTD Hydrogen Fleet Maintenance Shop Retrofit	\$2,800,000

Total Not Recommended for Programming: \$8,240,000

AGENDA ITEM **5B**



March 2026
SJCOG Board

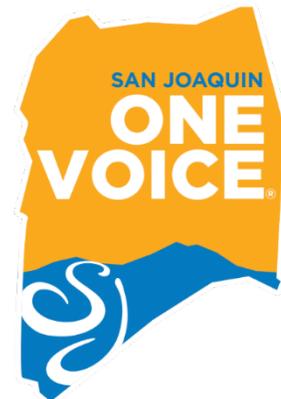
STAFF REPORT

SUBJECT: Approval of the 2026 One Voice® Program of Projects and Updated Federal Legislative Platform

RECOMMENDED ACTION: Recommend the SJCOG Board Approve the 2026 One Voice® Program of Projects and Updated Federal Legislative Platform

SUMMARY:

The San Joaquin One Voice® program is the San Joaquin Council of Governments (SJCOG) federal advocacy initiative for San Joaquin County that promotes projects, programs, and issues of regional significance through an annual trip to Washington, D.C.



The One Voice® program fosters intergovernmental coordination between San Joaquin County and various federal agencies through the development of a federal legislative platform and program of projects. The federal legislative platform provides direction to our congressional delegation and agency officials with respect to the transportation, infrastructure, and policy needs of San Joaquin County. Additionally, in September 2025, the SJCOG Board approved program guidelines and solicited a call for projects. The final program of projects will be carried forward to highlight during the 2026 One Voice® trip. Table 1 below lists the project applications received by SJCOG. More information for each project is outlined in Attachment A.

Table 1. 2026 One Voice® Submission List

Agency	Project
San Joaquin County, Department of Aviation	Stockton Metropolitan Airport Taxiway D Extension and Upgrade Phase I
City of Lathrop	The I-5 / Louise Avenue Interchange Project
City of Lodi	State Route 99 / Harney Lane Interchange Reconstruction
City of Manteca	SR 120 & Airport Way Diverging Diamond

	Interchange (DDI) Project
City of Mountain House	Byron Highway Widening Project
Port of Stockton	Sharpe Army Depot & Roth Road Corridor Improvements
San Joaquin Regional Transit District	Hybrid-Electric Bus Replacement
San Joaquin County Public Works	Grant Line Road Realignment Project (Tracy City Limits to Eleventh Street)
San Joaquin Council of Governments	Megaregion Investment Strategy (SR 99/120 Phase 1B & I-205 Managed Lanes)
San Joaquin Regional Rail Commission	San Joaquin Street Station Layover Track Project
City of Stockton and San Joaquin Regional Rail Commission (Co-sponsor)	Dr. Martin Luther King Jr. Boulevard Underpass Rail and Roadway Reconstruction
City of Tracy	I-205 Mountain House Parkway/International Parkway Interchange
<i>Environmental Sustainability (Non-transportation)</i>	
Stockton East Water District	Bellota Weir Modifications Project

Note: RTD has submitted an updated project.

Attachment B is the draft 2026 One Voice® Federal Legislative Platform.

RECOMMENDATION:

Recommend the SJCOG Board approve the 2026 One Voice® program of projects and 2026 federal legislative platform.

FISCAL IMPACT:

None at this time.

NEXT STEPS:

SJCOG staff will develop fact sheets for each regionally significant project to highlight the need for federal support during meetings with federal lawmakers and federal agency officials. The delegation from the region will travel to Washington, D.C., on May 4-7, 2026, to advocate for the projects.

COMMITTEE ACTIONS:

Technical Advisory Committee: Unanimously approved.

Management and Finance Committee: Unanimously approved.

Executive Committee: Unanimously approved.

ATTACHMENT:

Attachment A. 2026 One Voice® Project Summaries

Attachment B. 2026 One Voice® Federal Legislative Platform

Prepared by: Joel Campos, Senior Regional Planner

Attachment A. DRAFT 2026 One Voice® Project Summaries

AGENCY:	SAN JOAQUIN COUNTY, DEPARTMENT OF AVIATION
PROJECT:	Stockton Metropolitan Airport Taxiway D Extension and Upgrade Phase I
TOTAL PROJECT COST:	\$8,000,000
ONE VOICE® REQUEST:	\$7,200,000
DESCRIPTION:	Phase I of the project will design and construct an extension that will connect the parallel Taxiway D to Runway 11L-29R. Phase I extends Taxiway D by about 700 linear feet and adds one, 500-foot, 75-foot-wide connector, designed to accommodate wide-body passenger and cargo aircraft up to a B-747. The project includes taxiway shoulders, lighting, markings, and a full structural pavement section.
AGENCY:	CITY OF LATHROP
PROJECT:	The I-5 / Louise Avenue Interchange Project
TOTAL PROJECT COST:	\$34,800,000
ONE VOICE® REQUEST:	\$30,013,000
DESCRIPTION:	The project will enhance local and regional mobility by reconstructing the I-5/Louise Avenue Interchange into a modern Diverging Diamond Interchange (DDI). This improvement is designed to reduce congestion, optimize traffic flow, and expand multimodal travel options for all users.
AGENCY:	CITY OF LODI
PROJECT:	State Route 99 / Harney Lane Interchange Reconstruction
TOTAL PROJECT COST:	\$6,000,000
ONE VOICE® REQUEST:	\$5,100,000
DESCRIPTION:	This project includes the design, environmental studies, and right-of-way acquisition for the interchange improvements at State Route 99 and Harney Lane in Lodi, California. The project includes safety improvement to on-ramps and off-ramps in both directions, widening the overpass on Harney Lane (from two to four lanes), and the realignment of the East Frontage Road.
AGENCY:	CITY OF MANTECA
PROJECT:	SR 120 & Airport Way Diverging Diamond Interchange (DDI) Project
TOTAL PROJECT COST:	\$63,500,000
ONE VOICE® REQUEST:	\$62,000,000
DESCRIPTION:	The City of Manteca proposes to reconstruct the existing State Route (SR) 120 and Airport Way Interchange to a Diverging Diamond Interchange (DDI) configuration. The existing interchange is a Type L-2 spread diamond with single-lane on- and off-ramps, which no longer meet the operational demands of this heavily trafficked corridor. The proposed DDI will significantly improve traffic flow, safety, and mobility for drivers, pedestrians, and bicyclists.

AGENCY:	CITY OF MOUNTAIN HOUSE
PROJECT:	Byron Highway Widening Project
TOTAL PROJECT COST:	\$45,800,000
ONE VOICE® REQUEST:	\$22,000,000
DESCRIPTION:	The project will widen the existing two-lane Byron Road to a four-lane divided conventional highway within existing Right-of-Way limits, extending approximately two miles from 0.4 miles west of the Byron Road/Great Valley Parkway intersection to 0.5 miles east of the Mountain House Parkway intersection. This project also includes improved drainage and stormwater quality, construction of separated Class 1 shared-use paths, two additional southbound lanes, and a raised median, installing new traffic signals, and pavement/existing lane reconstruction/rehabilitation.
AGENCY:	PORT OF STOCKTON
PROJECT:	Sharpe Army Depot & Roth Road Corridor Improvements
TOTAL PROJECT COST:	Currently Being Finalized
ONE VOICE® REQUEST:	\$ 5,000,000
DESCRIPTION:	The Port's redevelopment vision revives the depot's historic logistics role by creating an Inland Port Facility that functions as a consolidation and containerization hub. Additional improvements include: I-5/Roth Road Interchange improvements, widening of Roth Road and intersection upgrades, railroad grade separations, and an eastern extension of Roth Road to State Route 99.
AGENCY:	SAN JOAQUIN REGIONAL TRANSIT DISTRICT
PROJECT:	Hybrid-Electric Bus Replacement
TOTAL PROJECT COST:	\$ 1,400,000
ONE VOICE® REQUEST:	\$ 1,400,000
DESCRIPTION:	San Joaquin Regional Transit District proposes to replace one aging transit bus with a new hybrid electric bus as part of its ongoing fleet modernization program. The new vehicle will improve service reliability, reduce emissions, and support RTD's efforts to provide safe, efficient, and sustainable public transportation for residents throughout Stockton and San Joaquin County. This investment will help maintain reliable transit service for the many riders who depend on RTD for access to employment, healthcare, education, and other essential destinations.

AGENCY:	SAN JOAQUIN COUNTY DEPARTMENT OF PUBLIC WORKS
PROJECT:	Grant Line Road Realignment Project (Tracy City Limits to Eleventh Street)
TOTAL PROJECT COST:	\$ 73,386,000
ONE VOICE® REQUEST:	\$ 12,190,000
DESCRIPTION:	Grant Line Road will have a 1.65-mile realignment in a southerly direction toward the intersection of 11th Street and South Bird Road. A new roadway will connect Bird Road north of 11th Street to the new Grant Line Road alignment. Additionally, South Bird Road north of 11th Street will dead-end just before 11th Street. Grant Line Road will have four 12-foot-wide travel lanes with a 14-foot-wide median. This median will either be landscaped or will accommodate 12-foot-wide left-turn lanes near intersections with local roadways. The existing Grant Line Road/G Street intersection will be modified to improve operations, and pedestrian enhancements will be added to the existing Grant Line Road at-grade crossing
AGENCY:	SAN JOAQUIN COUNCIL OF GOVERNMENTS
PROJECT:	Megaregion Investment Strategy (SR 99/120 Phase 1B & I-205 Managed Lanes)
TOTAL PROJECT COST:	\$ 172,477,917
ONE VOICE® REQUEST:	\$ 10,000,000
DESCRIPTION:	The Megaregion Investment Strategy focuses on improving safety and mobility on key freeway corridors in southern San Joaquin County through two standalone projects: the SR 99/120 Connector Project (Phase 1B) and the I-205 Managed Lanes Project. The SR 99/120 interchange is a critical regional connection but experiences severe congestion and a high collision rate. The project will improve traffic flow, circulation, and safety, providing long-term relief for morning commute traffic. The I-205 corridor carries traffic volumes of up to 146,000 vehicles per day, resulting in recurring congestion and safety concerns during peak periods. The Managed Lanes Project will enhance regional mobility by encouraging HOV use, improving travel time reliability, supporting freight movement, and increasing corridor throughput.

AGENCY:	SAN JOAQUIN REGIONAL RAIL COMMISSION
PROJECT:	San Joaquin Street Station Layover Track Project
TOTAL PROJECT COST:	\$ 21,473,000
ONE VOICE® REQUEST:	\$ 1,874,000
DESCRIPTION:	The San Joaquin Street Layover Track Project (Project) is a critical component of the Valley Rail Program for expanded Gold Runner intercity passenger rail service and ACE commuter rail service and is critical for efforts to create a more sustainable future for the San Joaquin Valley. Located in Stockton west of the existing San Joaquin Street Station along the BNSF Stockton Subdivision, the Project will construct new storage and layover track located approximately one mile west of the existing San Joaquin Street Station to support efficient train turn-backs and short-run Sacramento–Stockton service without occupying the mainline.
AGENCY:	CITY OF STOCKTON AND SAN JOAQUIN REGIONAL RAIL COMMISSION (CO-SPONSOR)
PROJECT:	Dr. Martin Luther King Jr. Boulevard Underpass Rail and Roadway Reconstruction
TOTAL PROJECT COST:	\$ 17,700,000
ONE VOICE® REQUEST:	\$ 16,200,000
DESCRIPTION:	The City of Stockton and the Rail Commission are cooperating to reconstruct the existing Dr. MLK Jr. Boulevard underpass. A reconstructed MLK Jr. Boulevard Underpass will provide a critically needed access to commercial centers, schools, and industrial complexes presently situated east and west of the underpass location.
AGENCY:	STOCKTON EAST WATER DISTRICT
PROJECT:	Bellota Weir Modifications Project
TOTAL PROJECT COST:	\$ 83,000,000
ONE VOICE® REQUEST:	\$ 28,540,000
DESCRIPTION:	The Project allows fish to access habitat further upstream and meet the objectives of the Central Valley Project Improvement Act (CVPIA), Clean Water Act (CWA), and the California Department of Fish and Wildlife (CDFW's) Species Conservation and Recovery program. Specifically, the project eliminates barriers to fish migration, reduces species survival stressors, increases habitat for threatened and endangered species, and increases water supply reliability to the municipal water treatment plant. This involves construction of a modern fish screen, a fishway for salmonids, and a fish exclusion structure that prevents entrainment.

AGENCY:	CITY OF TRACY
PROJECT:	I-205 Mountain House Parkway / International Parkway Interchange
TOTAL PROJECT COST:	\$ 75,159,000
ONE VOICE® REQUEST:	\$ 60,834,000
DESCRIPTION:	<p>The Project will improve the existing interchange to enhance traffic operations, reduce travel times, and improve goods movement. The Project will add new travel lanes southbound along Mountain House Parkway (north of the freeway) and northbound along International Parkway (south of the freeway) approaching the ramp termini. The Project will add a westbound loop on-ramp, realign the westbound diagonal on- and off-ramps, and widen the eastbound diagonal and loop on-ramps. The Project will also retime the signals at the ramp termini to maximize throughput during peak hours and accommodate bicyclists and pedestrians. The mouths of ramp entrances will be widened to accommodate truck turning movements from either direction. The improvements will accommodate the future I-205 Managed Lanes Project along the freeway. Additional improvements will include the interconnection between ramp meters and local roads located within 1,000 feet of the ramp termini signals.</p>

DRAFT

2026 SJCOG Legislative Platform

Transportation Funding and Finance

Increase transportation funding levels to all modes of transportation to better meet the needs of all rural, medium-sized, and large urban regions, and streamline funding authorization process to expedite access to funding by recipients.

Preserve and Enhance Discretionary Grant Funding: Congress should continue to provide discretionary grant opportunities in the next surface transportation bill. Discretionary grants play an important role, especially when they allow communities to utilize federal funding to address local and regional needs that augment national priorities. Congress should also maximize the value of these programs by focusing on efficiencies and simplifying grant requirements.

Invest in Freight and Goods Movement Programs. Congress should continue to invest in programs that focus on expanding the flow of freight and supply chain efficiency across all modes.

Sustain and Enhance Public Transit Funding. It is important that Congress maintain the historic contribution to transit programs from the Highway Trust Fund, supporting both the operation of and capital investment in bus and rail systems.

Economic Development

Investing in America: Support new programs that propose to fairly invest and rebuild infrastructure that result in increased safety, enhanced roadway system maintenance, and the creation and retention of American jobs, housing, and access to opportunity in areas identified for growth in a regional transportation plan.

Environment

Streamline environmental review and federal [permitting](#) regulations (NEPA related reviews) in transportation project delivery to assure more efficient project planning, design and execution.

Support investments in infrastructure projects that work toward protecting essential natural resources such as air, water, plants (habitat), animals, and farmland.

Megaregion (Interregional) Infrastructure

Megaregion travel is defined as travel between the 16 counties and 136 cities with a total population of nearly 11 million people, stretching from the Bay Area to the Central Valley and Sierra Nevada foothills. It is essential to improve and invest in transportation infrastructure for all modes

of transportation at the gateway corridors of San Joaquin County which facilitate travel in the megaregion. Examples of megaregion investments include but are not limited to:

- Investments aimed at making it more attractive to travel between counties by passenger rail and bus transit.
- Support strategic investments to improve goods movement for the supply chain (i.e. manufacturing and warehousing logistics) between the counties in the megaregion. Making easier the flow of goods within the megaregion through critical freight corridors and gateways. Such gateways include I-205, I-580, I-5, SR-99, SR-120, and rail and regional roadways (truck routes) traversing San Joaquin County to neighboring counties.

Surface Transportation Reauthorization

[Advocate for a federal transportation reauthorization platform for the next multi-year federal surface transportation program consistent with the reauthorization priorities above, as well as ones which maintain SJCOG's current governance and bylaws. Engage with MPO organizations, which SJCOG is a member including National Area Regional Councils, Association of Metropolitan Planning Organizations, and California Association of Councils of Governments and support aligned state or national MPO reauthorization priorities in advance of the IJA's expiration on September 30, 2026.](#)

AGENDA ITEM **5C**



March 2026
SJCOG, Inc.

STAFF REPORT

SUBJECT: Public Hearing for the Cerri Undine Rd
Preserve Acquisition

RECOMMENDED ACTION: (1) Open a Public Hearing for
Comments on the Preserve and (2)
Close the Public Hearing after
Receiving Comments

DISCUSSION:

SUMMARY:

As required under the San Joaquin County Multi-Species Habitat Conservation and Open Space Plan (SJMSCP), public notice and hearings are required on all acquisitions and dedications.



SJCOG, Inc. staff are currently working with the landowner of the Cerri Undine Rd property for a potential habitat easement of 130 +/- acres. The location of the property is along Undine Road near Old River to the northwest of the City of Lathrop in the Delta Zone. The property has an elevation of 6-9 feet above sea level according to the USGS Topo Map. The potential preserve is adjacent to existing SJCOG, Inc. preserves shown in attachment 1. Today's public hearing is the second to be held during the required 30-day public comment period.

RECOMMENDATION:

SJCOG, Inc. staff recommends conducting the public hearing.

FISCAL IMPACT:

No current fiscal impact. Should an easement be negotiated and approved by the SJCOG Inc. Board, there will be an expenditure of collected SJMSCP habitat fees for the easement acquisition.

BACKGROUND:

For preserve acquisitions, the SJMSCP requires notices and hearing procedures to be followed:

1. A 30-day public comment period for jurisdictional review prior to SJCOG, Inc. action. The 30-day comment period commenced February 5, 2026.
2. Public hearing at the Habitat Technical Advisory Committee noticed 30 days before recommendation to SJCOG, Inc.
3. Public hearing at the SJCOG, Inc. Board prior to a decision.

Notice is hereby given regarding the following properties: (see Attachment 1 Map)

1. Those certain properties described as 3601 W. Undine Road, Stockton CA (APN: 191-080-05)
2. Vendor: Marc Cerri
3. Price: Not to exceed \$7,500 per acre

The Cerri Undine Rd property has a total of 135 +/- acres overall. The landowner and SJCOG, Inc. are collaborating on an easement of 130 +/- acres under the habitat plan. The location of the property is along Undine Road northwest of the City of Lathrop in the Delta Zone with an elevation of 6-9 feet above sea level. The potential preserve is adjacent to existing SJCOG, Inc. preserves shown in attachment 1.

If acquired, SJCOG, Inc. staff intend to create the Preserve Management Plan (PMP) to reflect the existing Preserve Management Plans (PMP) for economy of scale as row crop habitat for species under the SJMSCP. There will be minor restoration planned on the properties.

NEXT STEPS:

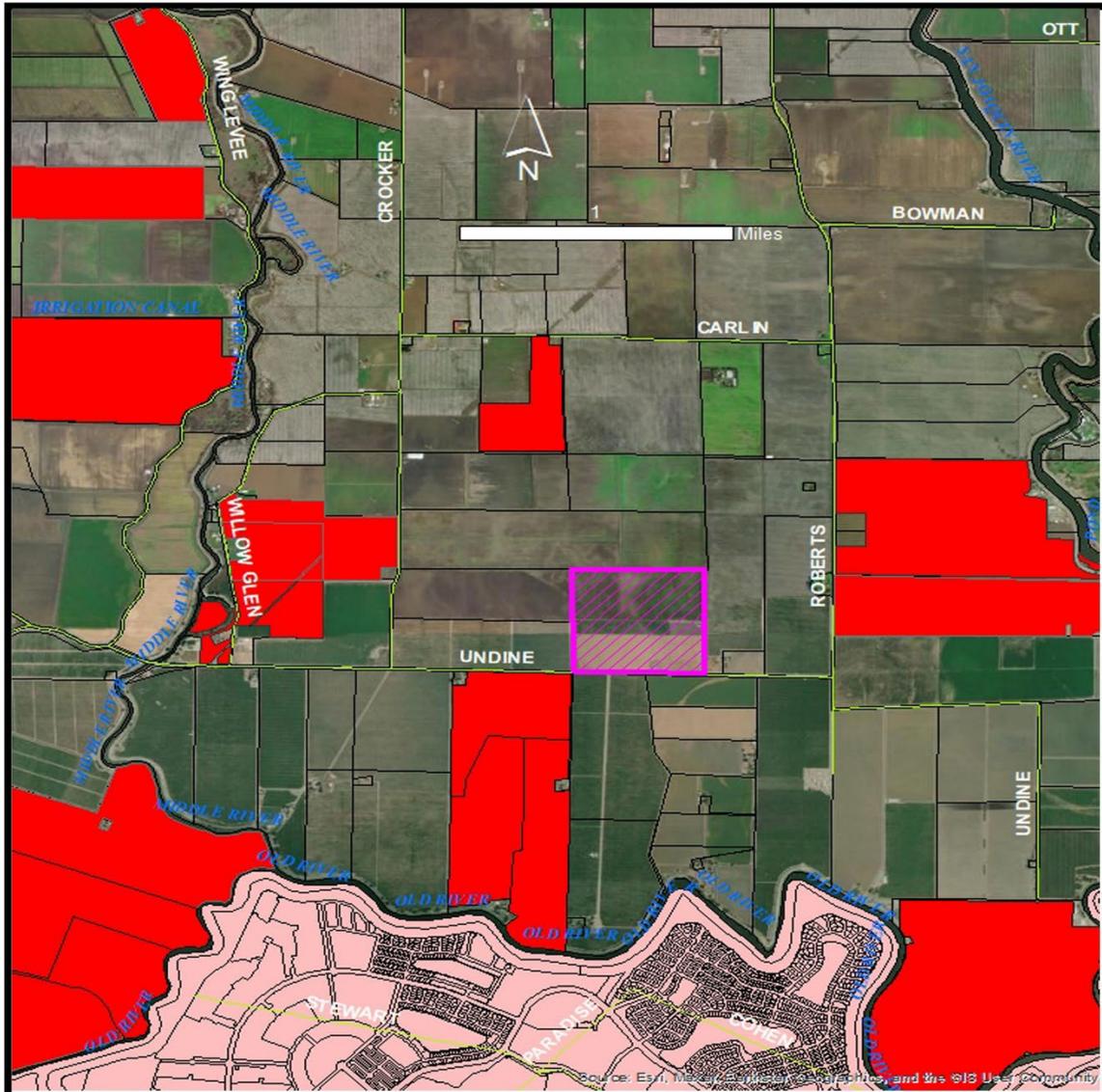
After the second public hearing at the SJCOG, Inc. Board meeting, the acquisition may move forward and be brought for HTAC and SJCOG, Inc. Board approval later.

ATTACHMENTS:

1. Overview Preserve Location Map

Prepared by Steven Mayo, Program Manager

ATTACHMENT 1



Cerri Undine Rd Property

Legend

-  SJCOC_Preserves
-  Cerri Undine Rd_191-080-05_Delta



AGENDA ITEM **7A**



March 2026
SJCOG Board

STAFF REPORT

SUBJECT: Receive Feedback on Regional Active Transportation Cycle 8 Regional Program

RECOMMENDED ACTION: Information Only

SUMMARY:

The purpose of this staff report is to provide an update on the Active Transportation Program (ATP) Cycle 8 Regional Program and to seek feedback on the draft regional program packet (Attachments A-D). Specifically, SJCOG staff is seeking feedback on “Program Updates and Changes” detailed below.

Proposed Program Updates and Changes

An ATP ad-hoc committee made up of five representatives from the County of San Joaquin, the cities of Manteca, Tracy, and Mountain House, and SJCOG’s Citizen Advisory Committee (CAC) met monthly from December 2025 to February 2026 to provide feedback to SJCOG staff on Cycle 8’s program structure. The committee recommended small modifications to the Cycle 8 program guidelines, application form, scoring rubric, and scorecard (all attached). The committee has suggested the following changes to the program guidelines:

1. To ensure compliance with the state program, the regional guidelines will more clearly specify that only 2% of state ATP funds can be used to fund Active Transportation Plans. This change is meant to ensure that projects that are past the planning phase (construction) can be prioritized for funding.
2. On Question 5A: Transit Access of the ATP Scoring Rubric, the "Transit Access in the Project Area" criteria has been changed from requiring a map of a 1/4 mile of the project vicinity and existing/planned infill and transit-oriented development to instead require a 1/2-mile map. This change was made to expand the range of eligibility for project submissions.

RECOMMENDATION:

Information only.

NEXT STEPS:

SJCOG staff is requesting feedback on the attached documents. Staff anticipates that standing committees and the SJCOG Board will take action on the attached documents in

April 2026. Documents will also be updated upon the California Transportation Commission (CTC) releasing the full 2027 ATP Cycle 8 Guidelines at the end of March.

FISCAL IMPACT:

None at this time.

BACKGROUND:

The Active Transportation Program (ATP) was created in 2013 by Senate Bill 99 and Assembly Bill 101 to promote the increased use of active modes of transportation, such as biking and walking. In 2017, Senate Bill 1 (SB1) required \$100 million of revenues from the Road Maintenance and Rehabilitation Account to be allocated annually to the ATP. The ATP distributes the total annual funding capacity among three separate programs:

1. 10% to small urban/rural areas with populations of 200,000 or less
2. 40% to Metropolitan Planning Organizations (MPO) in urban areas with populations greater than 200,000
3. 50% to the statewide program.
4. All funding must be competitively awarded, and 25% of program funds must benefit disadvantaged communities.

The CTC released the Draft ATP Fund Estimate for Cycle 8 at the January Commission meeting. The CTC provided approximately \$619.3 million in total funding for ATP Cycle 8. SJCOG anticipates receiving \$5.322 million through the MPO component of the program. The Final Fund Estimate will be considered for adoption at the March Commission meeting to be held on March 19-20, 2026.

The regional application includes 5 supplemental questions worth up to 25 points. In previous cycles, SJCOG’s Evaluation Committee was required to review and score both the state and regional applications. The table below breaks down the review process and points allocation.

Table 1. ATP Cycle 8 Review Process and Points Allocation

Application Type	Total Points	Reviewed By:
State Application	100	CTC
Regional Application	25	SJCOG’s Review Committee
Total Possible Points	125	----

Regional and Statewide Program Schedule:

Milestone	Date
Final ATP Guidelines adopted by CTC	Mar 19-20
ATP Fund Estimate adopted by CTC	Mar 19-20
Call for Projects Opens (Statewide Program)	Mar 19-20
MPO Guidelines Due to CTC	May 8
MPO Guidelines Adopted by CTC	June 25-26
Statewide Project Application Deadline to CTC	June 22
Regional Project Application Deadline to SJCOG	August 30
Staff Recommendations for Statewide and Small Urban & Rural Components Posted	November 2
Statewide Project List adopted by CTC	December 3-4
Regional Project Programming Recommendations due to CTC	April 23, 2027
Adoption of MPO Selected Projects	June 2027

ATTACHMENTS:

- A. Draft Regional ATP Cycle 8 Guidelines
- B. Draft Cycle 8 Regional ATP Application
- C. Draft Scoring Rubric
- D. Draft Scorecard

Prepared By: Joel Campos, Senior Regional Planner

Draft 2027 REGIONAL ACTIVE TRANSPORTATION PROGRAM GUIDELINES



**San Joaquin Council of Governments
March 2026**

SAN JOAQUIN COUNCIL OF GOVERNMENTS 2027 REGIONAL ACTIVE TRANSPORTATION PROGRAM GUIDELINES

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I. Introduction

1. Background

The Active Transportation Program (ATP) is a competitive statewide program created to encourage the increased use of active modes of transportation, such as biking and walking. Senate Bill 99 (Committee on Budget and Fiscal Review, Chapter 359, Statutes of 2013) and Assembly Bill 101 (Committee on Budget, Chapter 354, Statutes of 2013) created the ATP. Senate Bill 1 (SB 1) (Beall, Chapter 5, Statutes of 2017) directs additional funding from the Road Maintenance and Rehabilitation Account to the ATP.

The ATP distributes the total annual funding capacity among three programs, with 10% going to small urban/rural areas with populations of 200,000 or less, 40% going to Metropolitan Planning Organizations (MPO) in urban areas with populations greater than 200,000, and 50% going to the statewide program. All funding must be competitively awarded and at least 25% of funds in each program must benefit disadvantaged communities. The ATP has two separate grant processes, one led by the California Transportation Commission (CTC) and the other led by the ten large MPOs, including the San Joaquin Council of Governments (SJCOG).

These guidelines describe the policies, standards, criteria, and procedures for the development of the San Joaquin Council of Governments 2027 Regional Active Transportation Program.

Regional Stakeholder Engagement

These guidelines are a result of extensive stakeholder and public engagement with SJCOG's member jurisdictions. SJCOG staff convened an ad-hoc committee made up of volunteers from throughout the region to update the region's Active Transportation Program (ATP) Cycle 8 Program Package. The ad-hoc committee was made up of five representatives from the County of San Joaquin; the cities of Manteca, Tracy, and Mountain House; and a member from SJCOG's Citizen Advisory Committee (CAC), a group of community members that represent the geographical, social, cultural, and economic diversity of the region. The ad-hoc committee met monthly from December 2025 to February 2026 to review the guidelines and supporting documents for improvements, consistency, and compliance. Committee members also collaborated with SJCOG staff to update Cycle 8's Application, Scoring Rubric, and Scorecard.

2. Program Goals

The purpose of the ATP is to encourage the increased use of active modes of transportation, such as biking and walking. The goals of the ATP are to:

- Increase the proportion of trips accomplished by biking and walking.
- Increase the safety and mobility of non-motorized users.
- Advance the active transportation efforts of regional agencies to achieve greenhouse gas reduction goals, pursuant to Senate Bill 375 (Chapter 728, Statutes of 2008) and Senate Bill 391 (Chapter 585, Statutes of 2009).
- Enhance public health, including reduction of childhood obesity using public programs including, but not limited to, projects eligible for Safe Routes to School Program funding.

- Ensure that disadvantaged communities fully share in the benefits of the program.
- Provide a broad spectrum of projects to benefit many types of active transportation users.

3. Program Schedule and Funding Years

The programming capacity for the 2027 Regional Active Transportation Program will be for state fiscal years 2027/28 through 2030/31. The table below lists the major milestones for the development and adoption of the 2027 Regional Active Transportation Program:

Milestone	Date
Final ATP Guidelines adopted by CTC	Mar 19-20
ATP Fund Estimate adopted by CTC	Mar 19-20
Call for Projects Opens (Statewide Program)	Mar 19-20
MPO Guidelines Due to CTC	May 8
MPO Guidelines Adopted by CTC	June 25-26
Statewide Project Application Deadline to CTC	June 22
Regional Project Application Deadline to SJCOG	August 30
Staff Recommendations for Statewide and Small Urban & Rural Components Posted	November 2
Statewide Project List adopted by CTC	December 3-4
Regional Project Programming Recommendations due to CTC	April 23, 2027
Adoption of MPO Selected Projects	June 2027

III. Funding

4. Sources

The 2027 Regional Active Transportation Program is funded by the following state, local, and federal funding sources:

- State Active Transportation Program (ATP)

5. Funding Distribution

The 2027 Regional Active Transportation Program will be distributed as follows:

- State Active Transportation Program – \$5.322 million (per California Transportation Commission’s Fund Estimate, January 2026)

6. Matching Fund Requirements

SJCOG does not require a funding match for the 2027 Regional Active Transportation Program.

7. Leveraging Funds

The regional ATP program will only consider leveraged funds for plans, non-infrastructure, and small infrastructure projects since the statewide ATP program considers leveraged funds for medium and large infrastructure projects in its evaluation process. However, applicants are not required to leverage funds.

SJCOG will only consider cash funds for leveraging. Pre-construction phase activities funded by the applicant will be considered for leveraging even if the funds were expended before the application deadline. Funds expended for ineligible program costs and activities will not be considered as leveraged funding.

In-kind, non-infrastructure, staff time, or non-participating funds are not eligible for leveraging. Except for State Transportation Improvement Program (STIP) funding, SJCOG will only consider funds that are not allocated by the CTC as eligible leverage funds on a project-specific basis. Leveraging funds may include Non-competitive Measure K Bicycle, Pedestrian, and Safe Routes to School funds, other Measure K formula funds, or other federal or local funds.

Applicants must provide a complete, phase-by-phase project funding plan through construction that demonstrates that any competitive ATP funding and leveraged funding in the plan (i.e., local, federal, state, and private funds) is reasonably expected to be available and sufficient to complete the project. Additionally, applicants must attach a signed letter of commitment indicating the amounts and sources of leveraged funds. The letter of commitment must be signed by the Chief Executive Officer or other officer authorized by the applicant’s governing board. Applicants without a signed letter of commitment will not receive leveraging points. Applicants may also include other documentation to substantiate leveraging, including meeting minutes from a governing body, a budget sheet, a board, or council resolution, etc.

8. Funding for Active Transportation Plans

Funding from the Active Transportation Program may be used to fund the development

of community-wide active transportation plans, including bicycle, pedestrian, safe routes to schools, or comprehensive active transportation plans. State ATP funding can only be used to fund plans within a disadvantaged community or for area-wide plans that encompass at least one disadvantaged community. A list of the components that must be included in an active transportation plan can be found in the CTC's 2027 ATP Guidelines, Appendix A.

9. Fifty Percent (50%) Agency Cap

No agency or project may be awarded more than 50 percent of all available funds identified in the call for projects. If a project's total costs exceed more than 50 percent of the available funds, then the project would only be eligible for partial funding (i.e., up to 50 percent of the available funds). As with any partially funded project, SJCOG offers the applicant the right of first refusal or the opportunity to submit a scaled down version of the project scope. Any scaled down version of the project scope must provide a proportionate level of benefits, compared to the original project. If the applicant refuses to submit a scaled down project scope, then the award will be withdrawn.

10. Two Percent (2%) Cap on Plan Projects

Only 2% of State ATP funds allocated to MPOs may be used to fund active transportation plans. Therefore, where possible, plans should be funded through other means.

11. Reimbursement

The ATP is a reimbursement program for eligible costs incurred from a project. For an item to be eligible for reimbursement through Caltrans, the item's primary use or function must meet the program purpose and at least one program goal.

Reimbursement is requested through the invoicing process detailed in the Caltrans Local Assistance Procedures Manual, Chapter 5, Invoicing. Costs incurred prior to CTC allocation and, for federally funded projects, Federal Highway Administration project approval (i.e., Authorization to Proceed), are not eligible for reimbursement.

III. Eligibility

12. Eligible Applicants

Eligible applicants for the Active Transportation Program are specified in the CTC's 2027 ATP Guidelines and are listed below.

Only applications that have been submitted, reviewed, and scored in the Statewide Active Transportation Program will be accepted for consideration in the Regional Active Transportation Program. There is no limit on how many applications an eligible entity can submit.

The following entities within the State of California are eligible to apply for ATP funds:

1) Local, Regional, or State Agencies. Examples include city, county, MPO*, and Regional Transportation Planning Agency.

2) Caltrans.*

- Caltrans nominated projects must be coordinated and aligned with local and regional priorities. Caltrans is required to submit documentation that local communities are supportive of and have provided feedback on the proposed Caltrans ATP project.
- Caltrans must submit documentation to support the need to address the project with ATP funds, rather than other available funding sources such as the State Highway Operations and Protection Program (SHOPP).

3) Transit Agencies. Any agency responsible for public transportation that is eligible for funds under the Federal Transit Administration.

4) Natural Resources or Public Land Agencies. Federal, Tribal, State, or local agency responsible for natural resources or public land administration. Examples include:

- State or local park or forest agencies.
- State or local fish and game or wildlife agencies.
- Department of the Interior Land Management agencies.
- U.S. Forest Service.

5) Public schools or school districts.

6) Tribal Governments – federally recognized Native American Tribes.

- Tribal governments that are awarded funding have several options for contracting, such as a fund transfer to a federal agency or partnering with another eligible entity. Caltrans will work with Tribal governments to determine a Tribe's preferred contracting option.

7) Private nonprofit tax-exempt organizations that are responsible for the management of public lands may only apply with projects eligible for [Recreational Trails Program](#) funds. Eligible project types include recreational trails and trailheads, park projects that facilitate trail linkages or connectivity to nonmotorized corridors, and conversion of abandoned railroad corridors to trails. Projects must benefit the general public, not only a private entity.

8) Any other entity with responsibility for oversight of transportation or recreational trails that the Commission determines to be eligible. Eligibility should be established with Commission staff before the application deadline.

* Caltrans and MPOs, except for MPOs that are also regional transportation planning agencies, are not eligible project applicants for the federal Transportation Alternative Program funds appropriated to ATP. Therefore, funding awarded to projects submitted directly by Caltrans and MPOs is limited to other ATP funds. Caltrans and MPOs may partner with an eligible entity to expand funding opportunities.

13. Partnering With Implementing Agencies

Applicants are encouraged to partner with other agencies/groups, including private and non-profit organizations, when applying for funds.

14. Eligible Projects

All projects must be selected through a competitive process and must meet one or more of the following program goals. Refer to the CTC's 2027 ATP Guidelines, Appendix B, for example projects.

- Infrastructure Projects: Capital improvements that will further the goals of this program. This typically includes the environmental, design, right-of-way, and construction phases of a capital (facilities) project. State funds cannot be used to program a new infrastructure project without a complete Project Study Report (PSR) or PSR equivalent. The CTC will not consider feasibility studies as PSR equivalent documents.
- Plans: The development of a community wide bicycle, pedestrian, safe routes to school, or active transportation plan that encompasses or includes at least one disadvantaged community. See the CTC's 2027 ATP Guidelines, Appendix A, for Plan Project Guidance.
- Non-infrastructure Projects: Education, encouragement, and enforcement activities that further the goals of this program. See the CTC's 2027 ATP Guidelines, Appendix B, for example NI activities. SJCOG intends to focus funding for non-infrastructure on start-up projects. A project is considered a start-up project when no such program currently exists. An applicant must demonstrate how the start-up project will be sustained after ATP funding is exhausted. The program cannot fund existing or ongoing program operations. Non-infrastructure projects are not limited to those benefiting K-12 students. Program expansions or new components of existing programs are eligible for funding if the existing program or program components will be funded through other means.
- Infrastructure projects with non-infrastructure components.

15. Minimum Request for Funds

To maximize the effectiveness of program funds and to encourage the aggregation of small projects into one larger comprehensive project, the minimum funding request for infrastructure projects that will be considered is \$250,000. This minimum does not apply to non-infrastructure projects, plans, safe routes to school projects, and recreational trail projects.

16. Project Type Requirements

SB 99 specifies that at least 25% of funds must benefit disadvantaged communities within each of the program components. However, the ATP also includes other project types that must meet certain requirements. Below is an explanation of the requirements specific to the project types listed in SB 99.

A. Disadvantaged Communities

For a project to contribute towards the disadvantaged communities funding requirement, the project must clearly demonstrate, with verifiable information, a direct, meaningful, and assured benefit to a disadvantaged community as defined in the criteria outlined below. A project is considered beneficial if it fulfills an important need of a disadvantaged community in a way that provides a significant value. The project benefits must primarily target a disadvantaged community while avoiding substantial burdens to that community.

It is incumbent upon the applicant to clearly articulate how the project benefits the disadvantaged community; there is no presumption of benefit, even for projects located within a disadvantaged community. For a project to qualify as directly benefiting a disadvantaged community, the project must:

- Be located within, or be within reasonable proximity to, the disadvantaged community served by the project,
- Have a direct connection to the disadvantaged community, or
- Be an extension or a segment of a larger project that connects to or is directly adjacent to the disadvantaged community.

To qualify as a disadvantaged community the community served by the project must meet at least one of the following criteria:

- Median Household Income: (Table ID B19013) is less than 80% of the statewide median based on the most current Census Tract (ID 140) level data from the 2018-2022 American Community Survey (<\$73,524). Communities with a population of less than 15,000 may use data at the Census Block Group (ID 150) level. Unincorporated communities may use data at the Census Place (ID 160) level. Data is available at the [United States Census Bureau Website](#).
- CalEnviroScreen: An area identified as among the most disadvantaged 25% in the state according to the CalEPA and based on the California Communities Environmental Health Screening Tool 4.0 (CalEnviroScreen 4.0) scores (score must be greater than or equal to 40.05). The mapping tool can be found [here](#) and the list can be found under "[SB 535 List of Disadvantaged Communities](#)".
- National School Lunch Program: At least 75% of public-school students in the

project area are eligible to receive free or reduced-price meals under the National School Lunch Program for the 2022-2023 school year. Data is available at the [California Department of Education website](#). Applicants using this measure must indicate how the project benefits the school students in the project area. The project must be located within two miles of the school(s) represented by this criterion.

- Healthy Places Index: The Healthy Places Index includes a composite score for each census tract in the State. The higher the score, the healthier the community conditions based on 25 community characteristics. The scores are then converted to a percentile to compare it to other tracts in the State. A census tract must be in the 25th percentile or less to qualify as a disadvantaged community. The live map and the direct data can both be found on the California Healthy Places Index [website](#).
- Native American Tribal Lands: Projects located within Federally Recognized Tribal Lands (typically within the boundaries of a Reservation or Rancheria) and projects submitted by tribal governments (Federally Recognized Native American Tribes).
- Other: If an applicant believes that the project benefits a disadvantaged community, but the project does not meet the aforementioned criteria due to a lack of accurate information, the applicant may submit another means of qualifying for consideration. Commission staff will assess and score this question for applicants using the “Other” category to qualify as a disadvantaged community. Suggested alternatives that can be submitted under this category include:
 - Census data that represents a small neighborhood or unincorporated area. The applicant must submit for consideration a quantitative assessment, such as a survey, to demonstrate that the community’s median household income is at or below 80% of the state median household income.
 - CalEnviroScreen data that represents a small neighborhood or unincorporated area. The applicant must submit for consideration an assessment to demonstrate that the community’s CalEnviroScreen score is at or above 40.05.

B. Safe Routes to School Projects

For a project to qualify for a Safe Routes to School designation, the project must directly increase safety and convenience for public school students to walk and/or bike to school. Safe Routes to Schools infrastructure projects must be located within two miles of a public school or within the vicinity of a public school bus stop, and the school community, including students, parents, caregivers, teachers, and staff, must be the intended beneficiaries of the project. For Safe Routes to School non-infrastructure, the program must benefit school students, parents, caregivers, teachers, and/or staff and primarily be based at the school.

C. Recreational Trails Projects

Trail projects that are primarily recreational should meet the federal requirements of the

Recreational Trails Program, as such projects may not be eligible for funding from other sources. However, trails that serve active transportation purposes (such as multi-use paths, Class I bikeways, etc.) are fully eligible in the ATP and do not need to meet the Recreational Trails Program requirements.

IV. **Project Application**

There are five different applications available for applicants to complete depending on the project type and size. It is incumbent on the applicant to complete the appropriate application for their project. Applicants applying for infrastructure projects must utilize the application type based on the entire project cost, not the ATP request amount. All eligible projects must apply to one of the following application types. Applications for plans may not be combined with applications for infrastructure or non-infrastructure projects.

The five application types are:

1. Large Project, Infrastructure Only or Infrastructure/Non-Infrastructure

- Projects with a total project cost of greater than \$10 million will be considered a large project and must use the Large Project application. Caltrans and Commission staff may conduct onsite field reviews on a selection of projects that qualify as large projects. Field reviews are not indicative of the project's likelihood of receiving funding.
- Projects that qualify for the large application do not need to apply for construction and may apply for pre-construction phases only.

2. Medium Project, Infrastructure Only or Infrastructure/Non-Infrastructure

- Projects with a total project cost of more than \$3.5 million and up to \$10 million will be considered a medium project and must use the Medium Project application.

3. Small Project, Infrastructure Only or Infrastructure/Non-Infrastructure

- Projects with a total project cost of \$3.5 million or less will be considered a small project and must use the Small Project application.

4. Non-Infrastructure Only

- Education and encouragement activities that further the goals of the ATP. Non-infrastructure programs include those benefiting school students, older adults, or entire communities. Non-infrastructure projects may utilize existing best practices or be innovative in nature.

5. Plan

- Applicants can only apply for a plan with the Plan application. This application

cannot be combined with any other type of project. Plan projects must be within or encompass a disadvantaged community.

SJCOG will not consider quick-build projects.

17. Scaled-Down Scope

SJCOG is offering applicants an opportunity to submit a project with a scaled-down scope than what was originally submitted in the State ATP application. If a jurisdiction decides to propose a project with a scaled-down scope, then a revised state ATP application must be submitted alongside the Regional ATP Supplemental Application. In the supplemental application, the applicant needs to provide an explanation of scalability and how the revised project will provide a proportionate level of benefits as the original project.

18. Application Submittal Requirements

State applications will be available and must be submitted on the ATP online application portal. The 2027 Regional ATP Application must be submitted as described below.

All project applications must include the signature of the Chief Executive Officer, or another officer authorized by the applicant's governing board.

If the project is to be implemented by an agency other than the applicant, then documentation of the agreement between the project applicant and implementing agency must be submitted with the project application.

A project application must also include documentation of all other funds committed to the projects.

The following contents are to be included in the submitted application:

- Signed Cover Letter (electronic signature is accepted)
- Completed Supplemental Application
 - Project Information – Section I
 - Supplemental Questions – Section II
 - Existing Plans
 - Community/Neighborhood Impact
 - Safe Routes to Schools and Other Community Activity Centers
 - Leveraging of Other Funding
 - Transit Access
- Complete Appendix (in order)
 - State ATP Application
 - Leveraged Funding Letter of Commitment with Supporting Documentation
 - Any additional exhibits not included in your State ATP Application

One (1) electronic copy must be submitted via thumb drive, or email/file sharing site of the complete grant application, no later than 4:00 p.m. on TBD, to:

Joel Campos, Senior Regional Planner
San Joaquin Council of Governments
555 E. Weber Avenue
Stockton, CA 95202
campos@sjcog.org

V. Project Selection Process

19. Scoring Criteria

A project's ranking will be determined by its Statewide ATP score and Regional ATP score. The regional application will be reviewed and scored by SJCOG's Project Evaluation Committee while the statewide application will be reviewed and scored by CTC's Evaluation Committee. The regional application score will be added to the statewide score to determine a final score. A project can earn a total final score of 125 points, or the sum of the maximum regional and statewide scores. See the chart below to reference the scoring criteria and points allotted to the different project types. The chart below shows the maximum number of points for each scoring criteria based on project type. If a scoring criterion is left blank, it is not applicable to that project type.

SJCOG staff will form a multidisciplinary Project Evaluation Committee of volunteers to assist in reviewing and evaluating regional supplemental applications. SJCOG staff will add up each volunteer's score and divide the sum by the number of evaluators to get an average score. The average score from the regional application will then be added to the state application's score to get a final score.

Scoring Topic	Plan	NI Only	Infrastructure or Infrastructure with Non-Infrastructure (NI)		
			Small	Medium	Large
Benefits to Disadvantaged	30	10	10	10	10
Need	20	40	52	40	38
Safety		10	25	25	20
Public Participation & Planning	25	15	10	10	10
Scope and Plan Layout Consistency and Cost Effectiveness					7
Scope and Plan Layout Consistency		10	3	5	
Context Sensitive & Innovation		5		5	5
Transformative Projects					5
Evaluation and Sustainability		10			
Leveraging				5	5
Implementation & Plan Development	25				
Corps		(0 or -5)	(0 or -5)	(0 or -5)	(0 or -5)
Past Performance	(0 or -10)	(0 or -10)	(0 or -10)	(0 or -10)	(0 or -10)
Subtotal (Statewide Scores)	100	100	100	100	100
Regional Supplemental Questions					
Existing Plans	5	5	5	5	5
Community/Neighborhood	5	5	5	5	5
Safe Routes to Schools and	5	5	5	10	10
Leveraging of Other Funding	5	5	5		
Transit Access	5	5	5	5	5
Total	125	125	125	125	125

The regional application will include the following 5 supplemental questions:

- A. Existing Plans: The applicant's need for an active transportation plan or the proposed project's alignment with existing active transportation plans.
- B. Community/Neighborhood Impact: Proposed project's potential to transform non-motorized users' mobility and accessibility and increase community connectivity.

- C. Safe Routes to Schools and Other Community Activity Centers: Proposed project's potential to provide or improve safe and secure access to schools and other key community activity centers.
- D. Leveraging of Other Funding: The leveraged funding that will be committed to the proposed project if ATP competitive funding is awarded.
- E. Transit Access: Proposed project's potential to promote transit access and ridership.

The scoring rubric for the supplemental questions can be found in Appendix A.

If two or more projects receive the same score and both projects are at the funding cut-off score, the following criterion will be used to determine which project(s) will be funded. Criteria are listed in priority order.

- a. Infrastructure projects.
- b. Project readiness including, but not limited to, completed environmental clearance documents.
- c. Benefit to Disadvantaged Communities as a minimum of 25% of ATP funding must be programmed to projects that benefit disadvantaged communities per CTC requirements.

20. Project Evaluation Committee

SJCOG staff will form a multidisciplinary Project Evaluation Committee of 5 to 7 volunteers to assist in reviewing and scoring regional supplemental applications. When forming the Project Evaluation Committee, staff will seek participants with expertise in, but not limited to, bicycling and pedestrian transportation and land use; Safe Routes to Schools projects; and projects benefiting disadvantaged communities. Staff will also seek to have a balanced representation of representatives from local jurisdictions and non-governmental organizations to promote geographic equity.

21. Project Programming

SJCOG staff will allocate program funding to projects based on the project's final scores and input from the Project Evaluation Committee. SJCOG staff will seek to concentrate federal and state funding on as few projects as possible. Final programming recommendations are subject to review and consideration by SJCOG committees before being adopted by the SJCOG Board. Approval of ATP funding is also subject to approval by the CTC.

I. Project Information

1. Project Title: _____

2. Applicant Agency: _____

3. Agency Address: _____

4. Project Manager _____ Title: _____

Email: _____ Phone Number: _____

5. **Project Description** Briefly describe the existing conditions, scope, and expected benefits. If the project is a component within a larger or multi-phase project, describe the “parent” project as well.

6. **Project Location** Briefly describe the project location(s):

7. Project Type

- Large Infrastructure
- Large Infrastructure with Non-Infrastructure
- Medium Infrastructure
- Medium Infrastructure with Non-Infrastructure
- Small Infrastructure
- Small Infrastructure with Non-Infrastructure
- Non-Infrastructure Only
- Plan

8. Schedule

	Completion _____	Start Date _____
PA&ED	_____	_____
PS&E	_____	_____
ROW	_____	_____
Construction	_____	_____
	Start Date _____	Completion _____
Non-Infrastructure and Plans	_____	_____

9. Funding Requested: \$ _____

10. Total Project Cost: \$ _____

11. Did you submit this project for the 2027 Statewide Active Transportation Program?

(Note: All projects must be submitted, reviewed, and scored in the statewide program to be considered for the regional program)

 Yes No

If yes, are you applying for a scaled-down scope from what was in your State ATP Application?

 Yes No

If yes, revise these parts of your State ATP Application and submit it with your 2027 SJCOG Regional ATP Supplemental Application. This information is needed for Caltrans to process your project if ATP funding is awarded.

- Part A2: General Project Information
- Part A4: Project Details
- Part A5: Project Schedule
- Part A6: Project Funding

12. Scaled Down Scope Description If SJCOG could only partially fund your project, is there a scaled down version of your project that you would prefer to be funded? If so, please describe the revised project, associated benefits, and associated cost(s). Please note that the scaled down project must provide a proportionate level of benefits as the original project.

Infrastructure Type (only intended for Infrastructure projects)

Note: do not double-count the improvements that benefit both Bicyclists and Pedestrian (i.e. new RRFB/Signal should only show as a Pedestrian or Bicycle Improvement).

Bicycle Improvements

New Bicycle Facilities:	Class 1: _____ Linear Feet	Class 2: _____ Linear Feet
	Class 3: _____ Linear Feet	Class 4: _____ Linear Feet
Signalized Intersections:	New Detection/Bike Boxes: _____ Number	Timing Improvements: _____
Un-Signalized Intersections:	New RRFB/Signal: _____ Number	Crossing-Surface Improvements: _____ Number
Mid-Block Crossing:	New RRFB/Signal: _____ Number	Crossing-Surface Improvements: _____ Number
Lighting:	Intersection: _____ Number	Roadway Segments: _____ Linear Feet
Bike Share Program:	New Bike Share Station: _____ Number	New Bike Share Bikes: _____ Number
Bike Racks/Lockers:	New Racks: _____ Number	New Lockers: _____ Number
Other Bicycle Improvements	#1: _____ #: _____	#2: _____ #: _____

Pedestrian Improvements

Sidewalks:	New (4' to 8' wide): _____ Linear Feet	New (Over 8' wide): _____ Linear Feet
	Widen Existing: _____ Linear Feet	Reconstruct/Enhance Existing: _____ Linear Feet
ADA Ramp Improvements:	New Ramp (none exist): _____ Number	Reconstruct Ramp to Standard: _____ Number
Signalized Intersections:	New Crosswalk: _____ Number	Enhance Existing Crosswalk: _____ Number
	Pedestrian signal heads: _____ Number	Shorten Crossing: _____ Number
	Timing Improvements: _____ Number	
Un-Signalized Intersections:	New Traffic Signal: _____ Number	New Roundabout: _____ Number
	New RRFB/Signal: _____ Number	Crossing-Surface Improvements: _____ Number
	Shorten Crossing: _____ Number	
Mid-Block Crossing:	New RRFB/Signal: _____ Number	Crossing-Surface Improvements: _____ Number
Lighting:	Intersection: _____ Number	Roadway Segments: _____ Linear Feet
Pedestrian Amenities:	Benches: _____ Number	Trash Cans: _____ Number
	Shade Trees: _____ Number	Shade Tree Type: _____
Other Ped Improvements	#1: _____ #: _____	#2: _____ #: _____

Multi-use Trail Improvements

Class 1 Trails:	New (8' or less wide): _____ Linear Feet	New (Over 8' wide): _____ Linear Feet
	Widen Existing: _____ Linear Feet	
Non-Class 1 Trails:	New _____ Linear Feet	Widen Existing: _____ Linear Feet
Other Trail Improvements	#1: _____ #: _____	#2: _____ #: _____

Vehicular-Roadway Traffic-Calming Improvements

Road Diets:	Remove Travel Lane: _____ Linear Feet	Remove Right-Turn Pocket: _____ Number
Speed Feedback Signs:	Speed Feedback Signs: _____ Number	
Signalized Intersections:	Timing Improvements: _____ Number	New Roundabout _____ Number
Un-Signalized Intersections:	New Traffic Signal: _____ Number	New Roundabout: _____ Number
Other Traffic-Calming	#1: _____ #: _____	#2: _____ #: _____

II. Supplemental Questions

QUESTION #1: Existing Plans

Background: The purpose of this question is to ensure projects are driven by local bike/pedestrian plans. This question ensures plans are being implemented and that projects are adhering to the planning process.

A. For Plan Applications: To ensure jurisdictions have updated ATP plans, projects that develop a local ATP plan or update an existing ATP or related plan will be granted up to 5 points. Please provide a copy of the most recent ATP or related plan. If no ATP plan exists, please provide a letter from the city manager/executive director indicating that no such plan exists. **(0 to 5 POINTS)**

B. For Non-Infrastructure and Infrastructure Applications: Projects aligned with local and regional ATP plans or other related plans that address bicycle and pedestrian safety (e.g., Local Roadway Safety Plan, Systemic Safety Analysis Report, etc.) will be granted additional points. Please attach proof that this project is identified in an existing ATP or related plan. **(0 to 4 POINTS)**

C. For Non-Infrastructure and Infrastructure Applications: Priority projects will be granted additional points. Please attach proof that this project is identified or listed in an ATP or a related plan's priority list. **(0 to 1 POINT)**

QUESTION #2: Community/Neighborhood Impact

Background: Question #2 aligns with SJCOG's 2022 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS) Strategy Number 7: Provide transportation improvements to facilitate nonmotorized travel. The purpose of this question is to allow jurisdictions to clearly articulate how the proposed project will be transformational for the community.

- A. Please indicate how this project will transform bicyclists and/or pedestrians' mobility and accessibility compared to existing conditions. Applicants should provide context and can include attachments (e.g., maps) to get their point across. **(0 to 3 POINTS)**
- B. Please indicate if the project will connect or increase connectivity among 2 or more neighborhoods. Applicant should indicate how the project creates a connection over a man-made barrier (e.g., railroad) and/or a natural barrier (e.g., creek). **(0 to 2 points)**

QUESTION #3: Safe Routes to Schools and Other Community Activity Centers

Background: Question #3 aligns with SJCOG's 2022 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS) Strategy Number 10: Facilitate projects that reduce the number and severity of traffic incidents. Projects should ensure children, people with disabilities, and other non-motorized users (i.e., those walking and those on bikes, e-bikes, scooters, etc.) can safely access and navigate schools and other community assets.

A. Describe the location of the project. Describe how the project provides or improves access to the key Community Activity Centers including:

- Schools
- Parks
- Community Centers
- Community Gardens
- Libraries
- Large employment and shopping facilities
- Senior Centers
- Religious Centers and other quasi-public spaces
- Transit Stations

If a project improves access to a Community Activity Center not listed above, please describe why the location is considered a CAC. Explain how the location is frequented by non-motorized users to socialize, obtain support, and/or address other basic and social needs.

B. Attach a map of the location of the project and highlight any Community Activity Centers within ½ mile of the project.

For Plans, Non-Infrastructure, and Small Infrastructure (0 to 3 POINTS)
For Medium and Large (0 to 7 POINTS)

C. Describe proposed amenities (e.g., bulb-outs, speed bumps, elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags, etc.) specifically designed to increase safety for children, seniors, people with disabilities, and other non-motorized users.

For Plans, Non-Infrastructure, and Small Infrastructure (0 to 1 POINT)
For Medium and Large (0 to 2 POINTS)

D. Include Letters of Support from school districts, police departments, community centers, non-profits serving children, people with disabilities, and non-motorized users, or other entities who may be involved in daily operations related to pedestrian and bicycle traffic. **(0 to 1 POINT)**

QUESTION #4: Leveraging of Other Funding (Only for Plans, Non-Infrastructure, and Small Infrastructure Applications)

Background: The state application provides up to 5 additional points to medium and large infrastructure projects leveraging other funding. This scoring criteria disadvantages plans, non-infrastructure, and small infrastructure projects. To ensure a fair competition, SJCOG will provide plans, non-infrastructure, and small infrastructure projects up to 5 points for any leveraged funding.

Describe the leveraged funding that will be committed to the proposed project if ATP competitive funding is awarded (total value in dollars). The application funding plan must show all federal, state, and local funding allotted for this project. Non-competitive Measure K Bicycle, Pedestrian, and Safe Routes to School funds and other Measure K funds derived by formula may be used as matching funds.

Applicants must also attach a signed letter of commitment indicating the amounts and sources of leveraged funds. The letter of commitment must be signed by the Chief Executive Officer or other officer authorized by the applicant's governing board. Applicants may also include other documentation to substantiate leveraging, including meeting minutes from a governing body, a budget sheet, a board, or council resolution, etc. Applications without a signed letter of commitment or other documentation to substantiate leveraging will not receive leveraging points.

(0 to 5 POINTS)

Leveraged Funds

Funds either already expended by the applicant for a previous phase, or funds to be programmed for use on elements within the requested project. This funding can only be considered "leveraged" funding if it goes towards eligible participating project costs.

Total Project Cost: _____

Leveraged Funds: _____

% of Total Project Cost: _____ (20% of Project Cost Max / .25 Points per 1%)

Only direct funding and the direct expenses for completing project delivery milestones can be used. Please provide detailed information on actual costs for past milestones and estimated costs for future milestones.

QUESTION #5: Transit Access

Background: This question aligns with SJCOG's 2022 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS) Strategy Number 5: Optimize the public transportation plan to provide efficient and convenient access for users of all income levels. Projects should ensure children and non-motorized users (i.e., those walking and those on bikes, e-bikes, wheelchairs, scooters, etc.) can access public transit.

A. Attach a scaled map of the location of the project and all bus and rail transit stops and stations within **1/2 mile** of the project vicinity. If a transit stop will be added to an area in the future, include in the attachment a "will serve" letter from the transit operator that documents this. If applicable, highlight existing and planned infill and transit-oriented development within the project area. **(0 to 1 POINT)**

B. Describe how the project is in an area with a nearby passenger rail and/or bus transit stop that is accessible and has regular service, or if a transit stop will be added to the area as documented in a "will-serve" letter from the transit operator. **(0 to 4 POINTS)**

III. Supplemental Application Checklist

- Eligibility:** Potential applicants may check with SJCOG staff regarding their eligibility to apply for funding sources or the eligibility of their project.
- Program Schedule:** Review the Regional ATP Schedule for important dates.
- Application Contents:** Review pages for all needed elements:
 - **Signed Cover Letter (electronic signature is accepted)**
 - **Completed Supplemental Application**
 - **Project Information – Section I**
 - **Supplemental Questions – Section II**
 - Existing Plans
 - Community/Neighborhood Impact
 - Safe Routes to Schools and Other Community Activity Centers
 - Leveraging of Other Funding
 - Transit Access
 - **Complete Appendix – in order**
 - **State ATP Application**
 - Leveraged Funding Letter of Commitment with Supporting Documentation
 - **Any additional exhibits not included in your State ATP Application**

Please do not include a complete Master Plan or other local or regional planning document with your application.

- Submittal Deadline:** Please submit one (1) electronic copy via thumb drive, or email/file sharing site of the complete grant application no later than **5pm on TBD**, to:

Joel Campos, Senior Regional Planner
 San Joaquin Council of Governments
 555 E. Weber Avenue
 Stockton, CA 95202
campos@sjcog.org

Special Instructions & Expectations for Evaluators:

The evaluator should use their best judgment to choose the score they feel best represents the information given. If the applicant failed to provide accurate information, do not give full points for each sub-question.

QUESTION #1: Existing Plans

Based on the applicant's existing plans, evaluators shall give points according to the tables below.

- A. For Plan Applications Only (0 to 5 points):** To ensure jurisdictions have updated ATP plans, projects that develop a local ATP plan or update an existing ATP plan will be granted up to 5 points. Please provide a copy of your jurisdiction's most recent ATP plan. If no ATP plan exists, please provide a signed letter from your city manager/executive director indicating that no such plan exists. **(0 to 5 POINTS)**

Points	Applicants' need for a plan. (For Plan Applicants Only)
5 points	Applicant does not have a comprehensive active transportation plan nor a pedestrian plan, a bicycle plan, or a Safe Routes to School plan. Applicant provides a letter from the city manager/executive director indicating that no such plan exists.
4 points	Applicant is seeking to update a comprehensive active transportation plan that is older than 10 years. Applicant provides a copy of the most recent ATP plan.
3 points	Applicant is seeking to update a comprehensive active transportation plan that is 7 to 10 years old. Applicant provides a copy of the most recent ATP plan.
2 points	Applicant is seeking to update a comprehensive active transportation plan that is 4 to 6 years old. Applicant provides a copy of the most recent ATP plan.
1 point	Applicant is seeking to update a comprehensive active transportation plan that is 1 to 3 years old. Applicant provides a copy of the most recent ATP plan.
0 points	Applicant is seeking to update a comprehensive active transportation plan that is less than 1 year old. Applicant provides a copy of the most recent ATP plan.

B. For Non-Infrastructure and Infrastructure Applications: Projects aligned with local and regional ATP plans or other related plans that address bicycle and pedestrian safety (e.g., Local Roadway Safety Plan, Systemic Safety Analysis Report, etc.) will be granted additional points. Please attach proof that this project is identified in an existing ATP or related plan. **(0 to 4 POINTS)**

Points	Project alignment with existing plans. (For Non-Infrastructure and Infrastructure Applications Only)
4 points	The project is listed in an existing ATP or a bicycle and pedestrian safety related plan that is less than 2 years old. Applicant provides a copy of such plan.
3 points	The project is listed in an existing ATP or a bicycle and pedestrian safety related plan that is 3 to 5 years old years old. Applicant provides a copy of such plan.
2 points	The project is listed in an existing ATP or a bicycle and pedestrian safety related plan that is 6 to 10 years old years old. Applicant provides a copy of such plan.
1 point	The project is listed in an existing ATP or a bicycle and pedestrian safety related plan that is more than 10 years old years old. Applicant provides a copy of such plan.
0 points	The project is not listed in an existing ATP or a bicycle and pedestrian safety related plan.

C. For Non-Infrastructure and Infrastructure Applications: Priority projects will be granted additional points. Please attach proof that this project is listed in an ATP or a related plan’s priority list. **(0 to 1 POINT)**

Points	Priority of proposed project. (For Non-Infrastructure and Infrastructure Applicants Only)
1 point	The project is listed or identified as a priority project in an existing ATP or a bicycle and pedestrian safety related plan. Applicant provides a copy of such plan.
0 points	The project is not listed or identified as a priority project in an existing ATP or a bicycle and pedestrian safety related plan.

QUESTION #2: Community/Neighborhood Impact

- a. Please indicate how this project will transform bicyclists and/or pedestrians’ mobility and accessibility compared to existing conditions. Applicants should provide context and can include attachments (e.g., maps) to get their point across. **(0 to 3 POINTS)**

Points	Community/Neighborhood Impact. (<u>All Project Types</u>)
3 points	The applicant clearly demonstrates active transportation “needs” in the project area. The applicant documents the lack of connectivity, the lack of mobility for non-motorized users within the project area, and local public health issues and concerns. The applicant clearly demonstrates how the project will address the identified active transportation needs by creating or improving links or connections <u>and</u> encouraging the use of proposed projects to community/neighborhood destinations.
2 points	The applicant somewhat demonstrates active transportation “needs” in the project area. The applicant documents <i>only two</i> of the following: the lack of connectivity, the lack of mobility for non-motorized users within the project area, and local public health issues and concerns. The applicant somewhat demonstrates how the project will address the identified active transportation needs by either creating or improving links or connections <u>or</u> encouraging the use of proposed projects to community/neighborhood destinations.
1 point	The applicant minimally demonstrates active transportation “needs” in the project area. The applicant documents <i>only one</i> of the following: the lack of connectivity, the lack of mobility for non-motorized users within the project area, and local health concerns. The applicant somewhat demonstrates how the project may address the identified active transportation needs by either creating or improving links or connections or encouraging the use of proposed projects to community/neighborhood destinations.
0 points	The applicant does not clearly demonstrate active transportation needs in the project area. The application did not demonstrate in any way that the project would address the identified needs.

- b. Please indicate if the project will connect or increase connectivity among 2 or more neighborhoods. Applicant should indicate how the project creates a connection over a man-made barrier (e.g., railroad) and/or a natural barrier (e.g., creek). **(0 to 2 points)**

Points	Connecting Communities. (<u>All Project Types</u>)
2 points	The applicant clearly and convincingly demonstrates that the project will connect or increase connectivity among 2 or more neighborhoods.
1 point	The applicant clearly and convincingly demonstrates that the project will connect or increase connectivity among 1 neighborhood.

0 points	The project will not connect or increase connectivity among any neighborhood.
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QUESTION #3: Safe Routes to Schools and Other Community Activity Centers

A. Describe the location of the project. Describe how the project provides or improves access to the key Community Activity Centers including:

- Schools
- Parks
- Community Centers
- Community Gardens
- Libraries
- Large employment and shopping facilities
- Senior Centers
- Religious Centers and other quasi-public spaces
- Transit Stations

If a project improves access to a Community Activity Center not listed above, please describe why the location is considered a CAC. Explain how the location is frequented by non-motorized users to socialize, obtain support, and/or address other basic and social needs.

B. Attach a map of the location of the project and highlight any Community Activity Centers within ½ mile of the project.

**For Plans, Non-Infrastructure, and Small Infrastructure (0 to 3 POINTS)
For Medium and Large (0 to 7 POINTS)**

Points	Project location. <u>(For Plans, Non-Infrastructure, and Small Infrastructure Projects)</u>
3 points	The applicant clearly and convincingly demonstrates that the project improves access to at least 3 community activity centers.
2 points	The applicant clearly and convincingly demonstrates that the project improves access to 2 community activity centers.
1 point	The applicant clearly and convincingly demonstrates that the project improves access to 1 community activity center.
0 points	The project does not improve access to any community activity center.
Points	Project location. <u>(For Medium and Large Infrastructure Projects)</u>

7 points	The applicant clearly and convincingly demonstrates that the project improves access to at least 7 community activity centers.
6 points	The applicant clearly and convincingly demonstrates that the project improves access to 6 community activity centers.
5 points	The applicant clearly and convincingly demonstrates that the project improves access to 5 community activity centers.
4 points	The applicant clearly and convincingly demonstrates that the project improves access to 4 community activity centers.
3 points	The applicant clearly and convincingly demonstrates that the project improves access to 3 community activity centers.
2 points	The applicant clearly and convincingly demonstrates that the project improves access to 2 community activity centers.
1 point	The applicant clearly and convincingly demonstrates that the project improves access to 1 community activity center.
0 points	The project does not improve access to any community activity center.

C. Describe proposed amenities (e.g., bulb-outs, speed bumps, elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags, etc.) specifically designed to increase safety for children, seniors, people with disabilities, and other non-motorized users.

**For Plans, Non-Infrastructure, and Small Infrastructure (0 to 1 POINT)
For Medium and Large (0 to 2 POINTS)**

Points	Proposed Amenities. (For Plans, Non-Infrastructure, and Small Infrastructure)
1 point	The proposal includes at least one amenity specifically designed to increase safety for children, people with disabilities, and other non-motorized users. Amenities can include bulb-outs, speed bumps, elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags, etc.
0 points	The proposal does not include any amenities specifically designed to increase safety for children, people with disabilities, and other non-motorized users.
Points	Proposed Amenities. (For Medium and Large)
2 points	The proposal includes at least two amenities specifically designed to increase safety for children, people with disabilities, and other non-motorized users. Amenities can include bulb-outs, speed bumps,

	elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags, etc.
1 point	The proposal includes one amenity specifically designed to increase safety for children, people with disabilities, and other non-motorized users. Amenities can include bulb-outs, speed bumps, elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags, etc.
0 points	The proposal does not include any amenities specifically designed to increase safety for children, people with disabilities, and other non-motorized users.

D. Include Letters of Support from school districts, police departments, community centers, non-profits serving children, people with disabilities, and non-motorized users, and other entities who may be involved in daily operations related to pedestrian and bicycle traffic. **(0 to 1 POINT)**

Points	Letter of Support. <i>(All Project Types)</i>
1 point	Applicant provides at least two Letters of Support from a school district, police department, community center, or other entity who may be involved in the daily operations of the project once it is implemented.
0 points	Applicant provides 0 to 1 Letters of Support from a school district, police department, community center, or other entity who may be involved in the daily operations of the project once it is implemented, if applicable.

QUESTION #4: Leveraging of Other Funding (Only for Plans, Non-Infrastructure, and Small Infrastructure Applications)

Describe the leveraged funding that will be committed to the proposed project if ATP competitive funding is awarded (total value in dollars). The application funding plan must show all federal, state, and local funding allotted for this project. Non-competitive Measure K Bicycle, Pedestrian, and Safe Routes to School funds and other Measure K funds derived by formula may be used as matching funds. **(0 to 5 POINTS)**

Only direct funding and the direct expenses for completing project delivery milestones can be used. Please provide detailed information on actual costs for past milestones and estimated costs for future milestones.

Points	How points will be calculated. <i>(Only for Plans, Non-Infrastructure, and Small Infrastructure Applications)</i>
0-5 points	.25 points provided for every 1% provided as a match. Maximum of 5 points for 20% or more.

	<p>Applicant also provides a signed letter of commitment indicating the amounts and sources of leveraged funds. The letter is signed by the applicant’s Chief Executive Officer or other officer authorized by the applicant’s governing board.</p> <p>Note: An application without a signed letter of commitment will not receive leveraging points.</p>
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QUESTION #5: Transit Access

A. Attach a scaled map of the location of the project and all bus and rail transit stops and stations within **1/2 mile** of the project vicinity. If a transit stop will be added to an area in the future, include in the attachment a “will serve” letter from the transit operator that documents this. If applicable, highlight existing and planned infill and transit-oriented development within the project area. **(0 to 1 POINT)**

Points	Transit access in the project area. <i>(All Project Types)</i>
1 point	Applicant provides a map of the project area and highlights all bus and rail transit stops and stations within ½ mile of the project vicinity, and existing and planned infill and transit-oriented development, if applicable. Applicant also provides a “will” serve letter from the transit provider if a transit stop will be added in the future.
0 points	Applicant does not provide a map of the project area. If a map is provided, applicant does not highlight all bus and rail transit stops and stations within ½ mile of the project vicinity, and existing and planned infill and transit-oriented development, if applicable. Applicant does not provide a “will” serve letter from the transit provider if a transit stop will be added to the area in the future, if applicable.

B. Describe how the project is in an area with a nearby passenger rail and/or bus transit stop that is accessible and has regular service, or if a transit stop will be added to the area as documented in a “will-serve” letter from the transit operator. **(0 to 4 POINTS)**

Points	Transit access in the project area. <i>(All Project Types)</i>
4 points	<p>The project meets <u>at least two</u> of the following criteria:</p> <ol style="list-style-type: none"> 1. The project is less than 1/8 mile walk of a transit stop served by passenger rail and/or bus service. 2. Existing transit stop(s) serves at least 4 fixed routes. 3. Existing transit stop(s) has headways that average 15 minutes or less OR, a transit agency has provided a “will-serve” letter indicating that transit will be provided in the project area on headways of 15 minutes or less on average.

3 points	<p>The project meets <u>at least two</u> of the following criteria:</p> <ol style="list-style-type: none"> 1. The project is within a 1/8 and 1/4 mile walk of a transit stop served by passenger rail and/or bus service. 2. Existing transit stop(s) serves at least 3 fixed routes. 3. Existing transit stop(s) has headways between 15 to 30 minutes OR, a transit agency has provided a “will-serve” letter indicating that transit will be provided in the project area on headways of 30 minutes or less.
2 points	<p>The project meets <u>at least two</u> of the following criteria:</p> <ol style="list-style-type: none"> 1. The project is within a ¼ and 1/2 mile walk of a transit stop served by passenger rail and/or bus service. 2. Existing transit stop(s) serves at least 2 fixed routes. 3. Existing transit stop(s) has headways between 30 to 45 minutes OR, a transit agency has provided a “will-serve” letter indicating that transit will be provided in the project area on headways of 45 minutes or less.
1 point	<p>The project meets <u>at least two</u> of the following criteria:</p> <ol style="list-style-type: none"> 1. The project is within a 1/2 and 1 mile walk of a transit stop served by passenger rail and/or bus service. 2. Existing transit stop(s) serves at least 1 fixed route. 3. Existing transit stop(s) has headways between 45 to 60 minutes OR, a transit agency has provided a “will-serve” letter indicating that transit will be provided in the project area on headways between 45 to 60 minutes.
0 points	<p>The project meets <u>at least one</u> of the following criteria:</p> <ol style="list-style-type: none"> 1. There is no public transit service within 1 mile. 2. Existing transit stop(s) has headways longer than 60 minutes.

Evaluator Name:

1. Existing Plans	0 to 5 pts
A. <u>For Plan Applications</u> : To ensure jurisdictions have updated ATP plans, projects that develop a local ATP plan or update an existing ATP plan will be granted up to 5 points. Please provide a copy of the most recent ATP plan. If no ATP plan exists, please provide a letter from the city manager/ executive director indicating that no such plan exists.	0 to 5 pts
B. <u>For Non-Infrastructure and Infrastructure Applications</u> : Projects aligned with local and regional ATP plans or other plans that address bicycle and pedestrian safety (e.g., Local Roadway Safety Plan, Systemic Safety Analysis Report, etc.) will be granted additional points. Please attach proof that this project is identified in an existing ATP or bicycle and pedestrian safety plan.	0 to 4 pts
C. <u>For Non-Infrastructure and Infrastructure Applications</u> : Please attach proof that this project is listed in an ATP or a related plan's priority list. (0 to 1 POINT)	0 to 1 pts
2. Community/Neighborhood Impact	0 to 5 pts
A. <u>All Project Types</u> : Applicants should provide context and can include attachments (e.g., maps) to get their point across. Please indicate how this project will transform bicyclists and/or pedestrians' mobility and accessibility compared to existing conditions. Please indicate any ADA specific improvements.	0 to 3 pts
B. <u>All Project Types</u> : Please indicate if the project will connect or increase connectivity among 2 or more neighborhoods (0 to 2 points)	0 to 2 pts
3. Safe Routes to Schools and Other Community Activity Centers	<u>Plans, Non-Infrastructure, and Small Infrastructure: 0 to 5 pts</u> <u>Medium and Large: 0 to 10 pts</u>
A. Describe the location of the project. Describe how the project provides or improves access to the key Community Activity Centers including: -Schools -Parks -Community Centers -Community Gardens -Libraries -Large employment and shopping facilities -Senior Centers -Religious Centers and other quasi-public spaces -Transit Stations If a project improves access to a Community Activity Center not listed above, please describe why the location is considered a CAC. Explain how the location is frequented by non-motorized users to socialize, obtain support, and/or address other basic and social needs.	<u>Plans, Non-Infrastructure, and Small Infrastructure: 0 to 3 pts</u> <u>Medium and Large: 0 to 7 pts</u>
B. Describe proposed amenities specifically designed to increase safety for children and non-motorized users (e.g., bulb-outs, speed bumps, elimination of on-street parking, flashing stops signs/crosswalks, additional signage, crossing-guards, pedestrian flags etc.)	<u>All: 0 to 1 pts</u>
C. Include Letters of Support from school districts, police departments, community centers, and other entities who may be involved in daily operations related to pedestrian and bicycle traffic.	<u>All: 0 to 1 pts</u>

4. For Plans, Non-Infrastructure, and Small Infrastructure Applications: Leveraging of Other Funding	0 to 5 pts
.25 points provided for every 1% provided as a match. Maximum of 5 points for 20% or more. Applicant also provides a signed letter of commitment indicating the amounts and sources of leveraged funds. The letter is signed by the applicant's Chief Executive Officer or other officer authorized by the applicant's governing board. Note: An application without a signed letter of commitment will not receive leveraging points.	0 to 5 pts
5. Transit Access	0 to 5 pts
A. <u>All Project Types</u> : Attach a scaled map of the location of the project and all bus and rail transit routes, stops, and stations within 1/2 mile of the project vicinity. If transit service will be provided to an area in the future, include in the attachment a "will serve" letter from the transit operator that documents this. If applicable, highlight in the map existing and planned transit-oriented development within the project area (e.g., multifamily housing, community centers, grocery stores)	0 to 1 pts
B. All Project Types: Describe how the project is in an area with nearby passenger rail and/or bus transit service that is accessible and provides regular service, or if future transit service will be provided to the area as documented in a "will-serve" letter from the transit operator. Describe any existing or proposed passenger amenities (e.g., bus shelters, bike lockers, etc.) at transit stops in the area and all existing or proposed headways between buses in the area	0 to 4 pts
Total Points Possible (All Project Types)	25

AGENDA ITEM **7B**



March 2026
 SJCOG Board

STAFF REPORT

SUBJECT: Notify Partners of Federal Transit Administration 5310 Call for Projects Results

RECOMMENDED ACTION: Information Only

SUMMARY:

On June 30th, 2025, Caltrans solicited a call for projects for the Federal Transit Administration (FTA) Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Program for FFY 2024 and 2025 funds. San Joaquin transit operators and local non-profits that provide transportation services were eligible to apply to the Small Urban/Rural and the Stockton urbanized area (UZA) programs, depending on where they provide service.

Approximately \$24.4 million was available for the Small Urban/Rural, and \$978,252 was available for the Stockton UZA program. The call for projects closed on September 3rd, 2025. Two projects from the San Joaquin region were completed and reviewed by Caltrans. Both projects received funding from the Stockton UZA program. Table 1 shows the projects and their awards.

Table 1. FTA 5310 CFP Results

Agency	Project Description	Total Project Cost	Toll Credits Awarded	FTA 5310 Awarded	Total Award
Lodi Memorial Hospital Association, Inc. Adult Day Services	Operating Assistance	\$290,443	\$145,222	\$145,222	\$290,443
Catholic Charities of the Diocese of Stockton	Mobility Management	\$538,040	\$107,608	\$430,432	\$538,040
Catholic Charities of the Diocese of Stockton	Operating Assistance	\$100,856	\$50,428	\$50,428	\$100,856
Total		\$929,339	\$303,258	\$626,082	\$929,339

RECOMMENDATION:

Information Only

FISCAL IMPACT:

None at this time.

BACKGROUND:

The FTA Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities Program is authorized by 49 United States Code (U.S.C.) 5310. The goal of the FTA 5310 Program is to improve the mobility of seniors and individuals with disabilities by removing barriers to transportation services and expanding the transportation mobility options available.

All FTA 5310 funded projects must be included in a locally developed, coordinated public transit-human services transportation plan (Coordinated Plan).

This program provides grant funds for capital, mobility management, and operating expenses for:

- Public transportation projects that are planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable;
- Public transportation projects that exceed the requirements of the Americans with Disabilities Act (ADA);
- Public transportation projects that improve access to fixed-route service and decrease reliance on complementary paratransit;
- Alternatives to public transportation projects that assist seniors and individuals with disabilities.

Prepared by: Joel Campos, Senior Regional Planner

AGENDA ITEM **7C**



March 2026
SJCOG Board

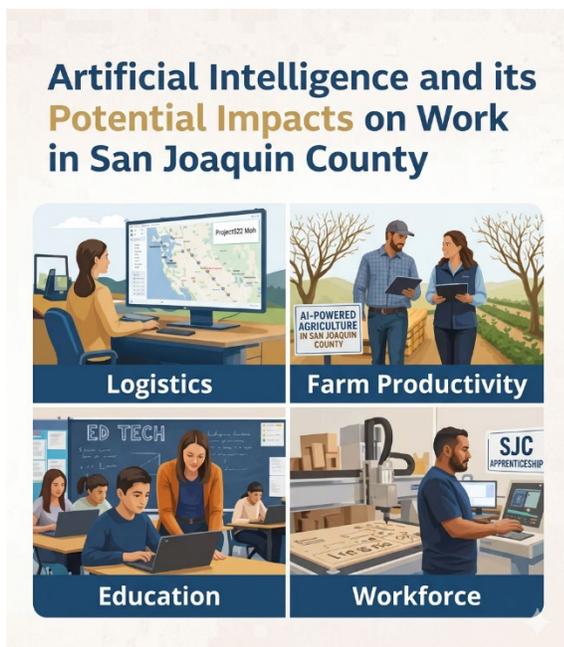
STAFF REPORT

SUBJECT: Announcement of Artificial Intelligence and the Future of Jobs – SJCOG and the Center for Business and Policy Research Speaker Series Event

RECOMMENDED ACTION: Information

DISCUSSION:

SUMMARY:



The San Joaquin Council of Governments (SJCOG) and Center for Business and Policy Research (CBPR) at the University of the Pacific (UOP) are excited to announce the latest installment in its on-going speaker series events – *Artificial Intelligence and the Future of Jobs*. While the webinar will discuss the rise of artificial intelligence (AI) as it relates to the economy and jobs generally, the focus will be on the exposure to AI across different sectors throughout the Central Valley and surrounding counties.

This speaker series event will discuss how AI is more likely to influence the way work is performed by supporting existing jobs and increasing productivity rather than eliminating jobs – vital information for economic

development, job training, and worker retention. It's a don't miss event.

The upcoming Speakers Series event will be held on Thursday, April 2nd at 12 p.m. at the SJCOG Board Conference Room, 555 E Weber Ave., Stockton, CA 95202, and virtually through Zoom. Log-in information will be posted on the SJCOG website as soon as it becomes available.

CBPR has partnered with SJCOG for over 15 years to produce a wide variety of data-driven, high-quality work products. They have been a key partner for SJCOG in the development of the San Joaquin County Demographic and Employment Forecast, the

Data Compass website, and numerous well-received webinars as part of this ongoing speaker series. Previous speaker series and future events can be viewed on the SJCOG Data Center webpage, <https://www.sicog.org/414/Speaker-Series-Reports-Studies>.

RECOMMENDATION:

Information

FISCAL IMPACT:

None

BACKGROUND

SJCOG has maintained a strong partnership with the CBPR at UOP since its establishment in 2004 as the Business Forecasting Center. Initially, CBPR was created to engage local agencies in San Joaquin County in collaborative efforts to promote regional economic development. Over the years, CBPR has significantly expanded its analytical capabilities, providing invaluable insights through quarterly regional reports and a diverse array of data resources.

CBPR has also supported collaboration on the Regional Transportation Plan (RTP), leveraging insights from census data and other analytical tools to inform planning and policy developments in San Joaquin County.

Another prominent function of the partnership between CBPR and SJCOG has been the [Speakers Series](#), which began in 2017. The purpose of these events is to bring together experts in different fields to discuss topics important to the region, such as housing affordability, healthy communities, jobs, and the economy.

FORECASTING GROWTH & CHANGE:
Exploring Future California & the North San Joaquin Valley

Join us on April 2, 2025, from 12:00 to 1:30 PM for an insightful webinar on forecasted demographic changes and their implications for California and the North San Joaquin Valley (NSJV). Organized in partnership with the San Joaquin Council of Governments (SJCOG) and the North Valley THRIVE (NVT) initiative, this session will explore significant shifts in population trends over the next 25 years and what they mean for the region's workforce, healthcare system, and economic growth. Experts will break down key forecasts and discuss critical topics, including the aging population, workforce development, and inter-regional migration patterns. Don't miss this opportunity to gain valuable insights and engage in discussions shaping the future of the NSJV and beyond.

SPEAKERS

- **Sanjita Mitra**, Chief Economist, California Department of Finance's Forecasting Unit
- **Walter Schwarm**, Chief Demographer, California Department of Finance's Forecasting Unit
- **Thomas Pogue**, Executive Director, CBPR at University of the Pacific

WEBINAR DETAILS
 Wed., April 2, 2025 | 12:00 - 1:30 PM (PDT)
 • Attend in person or via Zoom

PRESENTED IN PARTNERSHIP WITH

SAN JOAQUIN
COUNCIL OF GOVERNMENTS
CALIFORNIA

Prepared by Isaiah Anderson, Associate Regional Planner