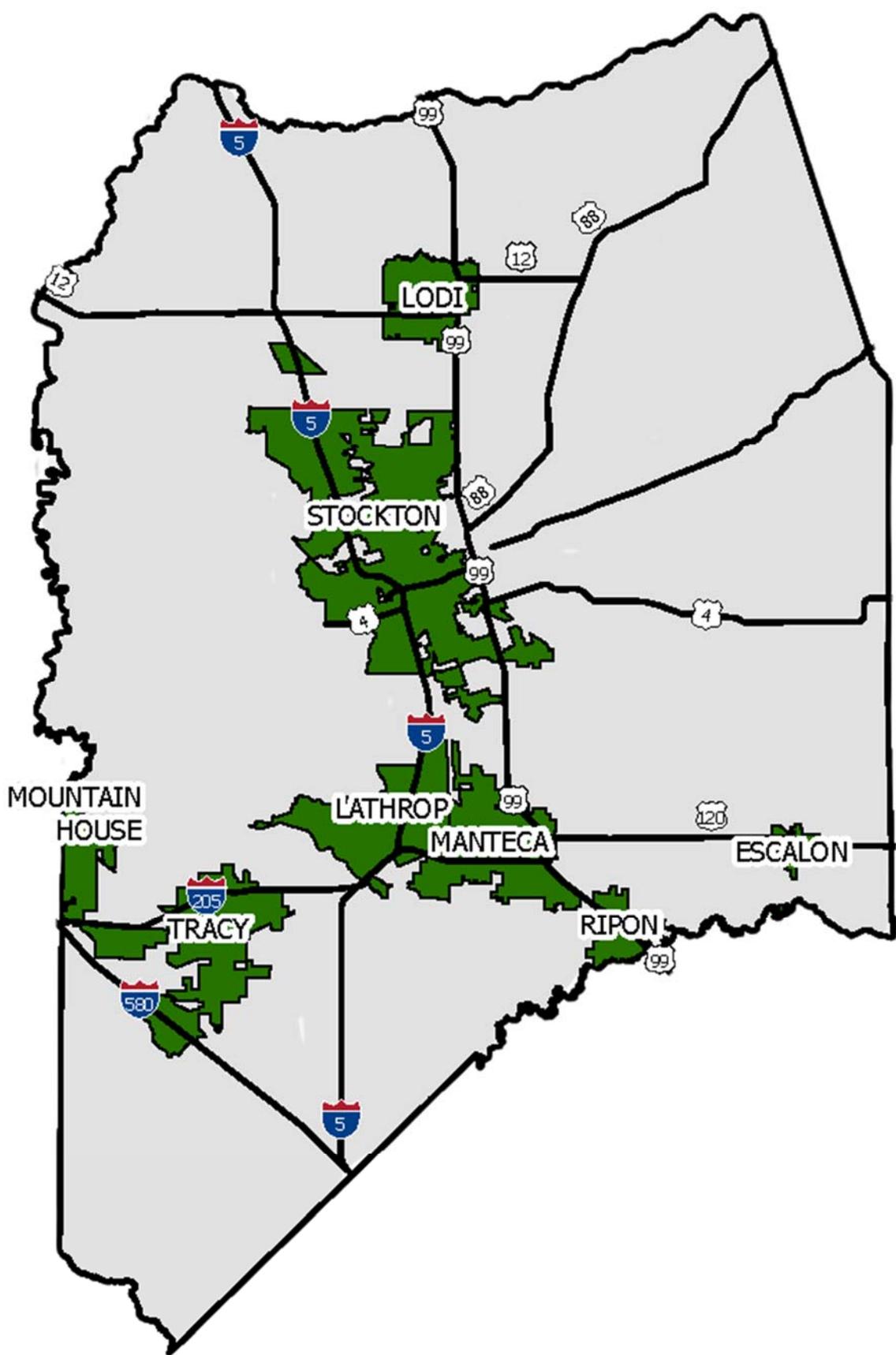


San Joaquin Council of  
Governments  
FY 2025-2026  
Overall Work Program  
San Joaquin  
Council of Governments

Draft February 27, 2025

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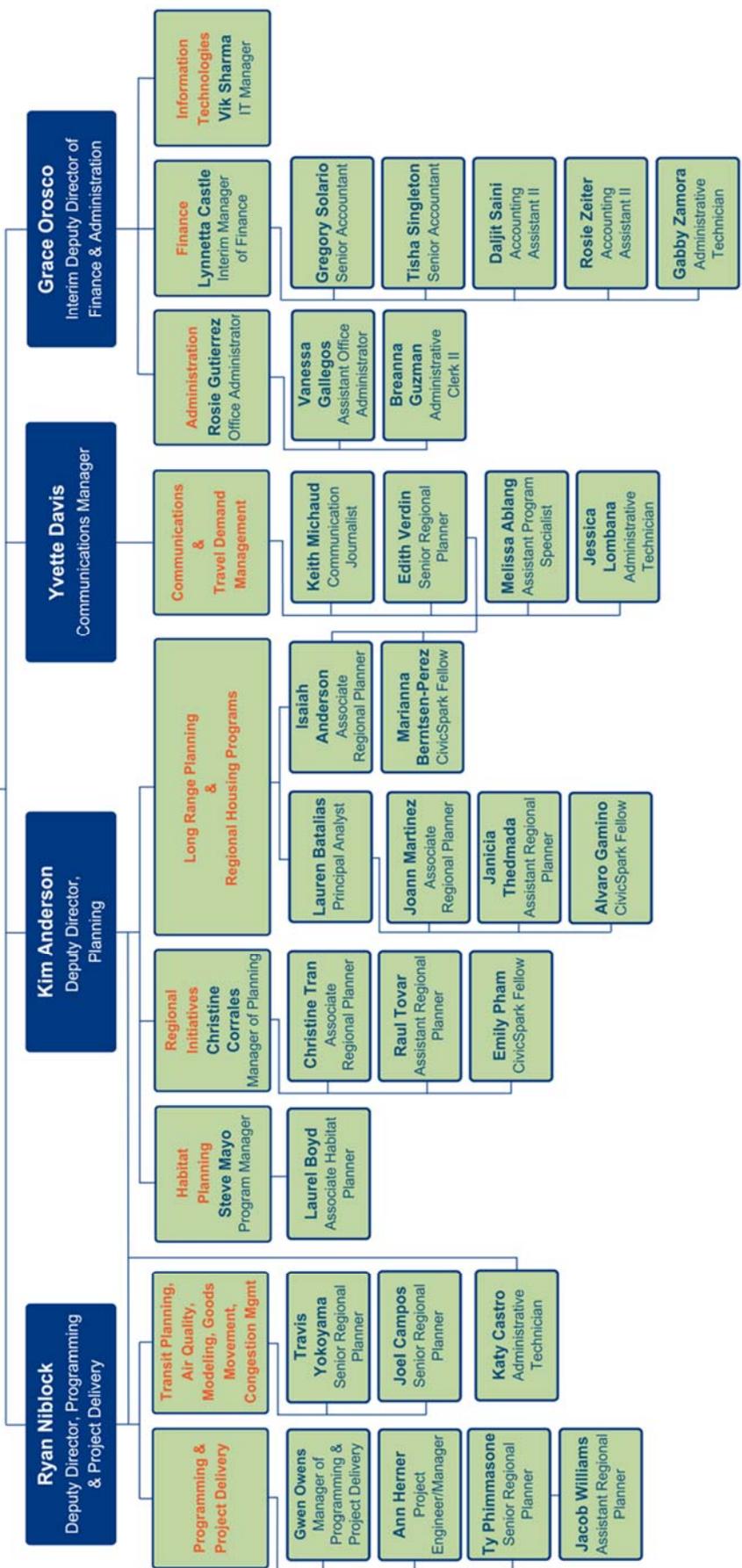
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# **SAN JOAQUIN COUNCIL OF GOVERNMENTS OVERALL WORK PROGRAM**

## **I. THE SAN JOAQUIN COUNCIL OF GOVERNMENTS**

The San Joaquin Council of Governments is a Joint Powers Agency (JPA) created in 1968 by the County of San Joaquin and the Cities of Stockton, Lodi, Manteca, Tracy, Ripon, Escalon, and Mountain House. In 1991, the newly incorporated City of Lathrop signed the Joint Powers Agreement, followed by the newest city in the state, Mountain House, in 2024. The role of the Council of Governments is to serve the functions designated by signatories to the agreement. Generally, SJCOG'S role is to foster intergovernmental coordination, both within San Joaquin County, as well as with neighboring jurisdictions, the other regional agencies for the San Joaquin Valley, the State of California, and various Federal agencies, including government to government consultation with Native American Tribal Governments in the region. The specific roles of the Council of Governments are described below. A sixteen-member Board composed of thirteen locally elected officials and three ex-officio members directs the Council of Governments. The Board has three members of the San Joaquin County Board of Supervisors, three members of the Stockton City Council, and one member from each of the County's seven other cities. The ex-officio members are a Port of Stockton of Commissioner, a San Joaquin Regional Transit District Board member, and Caltrans District 10's Director. Under the direction of the Executive Director, a professional staff carries out the activities of the Council of Governments. The Board and staff are identified on the inside cover of this document.

In accordance with Title VI of the Civil Rights Act of 1964, as amended, the San Joaquin Council of Governments assures that it is in compliance with all requirements of 49 CFR part 21; FTA circular 4702.1 "Title VI Program Guidelines for Federal Transit Administration Recipients"; and other applicable directives, so that no person in the United States, on the basis of race, color, national origin, creed, sex, or age will be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination in any program or activity, particularly in the level and quality of mass transportation services and mass transportation-related benefits for which the Applicant receives Federal financial assistance from the U.S. DOT or FTA.

## **II. THE ROLES OF THE SAN JOAQUIN COUNCIL OF GOVERNMENTS**

Since 1969, the Council of Governments has filled a variety of niches for its member jurisdictions. A short description of each of these roles is contained below:

### **A. Regional Transportation Planning Agency (RTPA)**

In 1973, SJCOG was recognized as the Regional Transportation Planning Agency for San Joaquin County. Initially, the designation related solely to the administration and allocation of Transportation Development Act (TDA) funds for public transit and possible road and street projects. However, over time the RTPA designation has expanded such that SJCOG is the agency responsible for adopting a Regional Transportation Plan

(RTP) and a Regional Transportation Improvement Program (RTIP) that programs state and federal funds within the region's boundaries. In addition, the designation gives SJCOG planning and coordination responsibilities over most federal and state funding programs for transportation administered by the State of California.

B. Metropolitan Planning Organization (MPO)

Metropolitan Planning Organization is a federal designation identifying the San Joaquin Council of Governments as the agency responsible for carrying out federal guidelines, regulations, and statutes for planning and coordination. SJCOG's region is designated as a Transportation Management Area and SJCOG is carrying out federal Congestion Management functions.

The Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) certifies MPOs every four years to review their transportation planning process and ensure that their planning activities are conducted in accordance with FHWA and FTA regulations, policies, procedures, and guidance. SJCOG underwent a quadrennial review in 2021 and was recertified in June 2021. A new certification process is due to be completed in the 2024/25 fiscal year.

C. Airport Land Use Commission (ALUC)

On August 7, 1973, the Board of Supervisors and the Mayor of each city designated the San Joaquin Council of Governments as the appropriate agency to assume the planning responsibilities of the Airport Land Use Commission. The ALUC is responsible for preparing and enforcing an Airport Land Use Compatibility Plan (ALUCP) around each public access airport in San Joaquin County. The purpose of the ALUCP is to maximize public safety and long-term effectiveness of airports by eliminating the use of conflicting land uses. A partial update of the ALUCP was completed in June 2009, which included all public access airports except the Stockton Metropolitan Airport. An update to the ALUCP to include Stockton Metropolitan Airport was completed and adopted in fiscal year 2015/16. The last minor update occurred in 2018, with a new fee schedule and reporting process implemented during FY21/22.

D. Census Data Center (CDC)

The State of California participates in a national State Data Center Program with the U.S. Bureau of the Census and by maintaining the legislatively mandated State Data Center (SDC). The SDC is located within the Demographic Research Unit of the California Department of Finance. The San Joaquin Council of Governments is an affiliate data center within the California State Data Center Program. In this role, SJCOG receives reports and documentation from the U.S. Bureau of the Census. SJCOG generates numerous reports using the most current census data available. SJCOG also assists the Census Bureau in various special census projects.

In addition, SJCOG works with the State of California Department of Finance, which is responsible for annual updates on California and local demographics. Starting in 2007,

and continuing through this year, SJCOG partnered with University of the Pacific's Center for Business and Policy Research to provide data center services and various demographic and economic studies for both internal use and dissemination to the public and other stakeholders through a wide variety of mediums.

E. Congestion Management Agency (CMA)

Following approval of Proposition 111 by California state voters in June 1990, SJCOG was named the Congestion Management Agency for San Joaquin County in 1991. SJCOG adopted its first Congestion Management Program (CMP) in November of 1991. As of 2020, SJCOG has chosen to "opt-out" of the state CMP but continues to implement the required Federal Congestion Management Process. The current update to the CMP was adopted by the SJCOG Board of Directors in December 2024. This OWP will continue implementation and monitoring activities in this area through an annual monitoring report.

F. Local Transportation Authority (LTA)

In November of 1990, San Joaquin County voters passed Measure K, a ½-cent increase in sales tax to support specific transportation improvements. SJCOG is designated the Local Transportation Authority, the agency responsible for administering the sales tax program and delivering the projects identified in the Measure's Expenditure Plan. Measure K was renewed for 30 years to 2041 in November 2006.

G. San Joaquin- Merced Transportation Demand Management (*dibs* program)

As a Transportation Control Measure (TCM) and Transportation Demand Management (TDM) Program, SJCOG provides a commuter service program under the auspices of *dibs* and serves the counties of San Joaquin and Merced. Dibs offers a multi-modal trip planning system, vanpool incentives, community and employer outreach, an emergency ride home program, and coordinates special events. The goal of the program is to help meet community objectives by reducing congestion and improving air quality by promoting smart travel options such as carpooling, transit, vanpooling, biking, and walking. At the end of the 2023-2024 fiscal year, the vanpool program had a total of 399 vans, removed 414,960 cars off the road and reduced vehicle miles traveled by 3 million. Services for Merced County are provided through a contract with the Merced County Association of Governments (MCAG).

H. Regional Housing Needs Allocation (RHNA)

The state establishes affordable housing targets for each county. In San Joaquin County, SJCOG is responsible for determining the fair share distribution of those affordable units among our member jurisdictions. This responsibility is codified in state law. Per SB 375, the RHNA process is an integral part of developing a Sustainable Communities Strategy (SCS) for the San Joaquin County region. The current (2023-2031)

RHNA was completed as a coordinated effort with the 2022 Regional Transportation Plan (RTP) and Sustainable Communities Strategy (SCS). It was adopted by the SJCOG Board in late 2022, then presented for approval by the California Department of Housing and Community Development (HCD). The plan was approved in late 2022. This process occurs every eight years and will not be completed again until 2030.

Since Mountain House was incorporated as California's newest city in July of 2024, it must go through a RHNA transfer and incorporation process to ensure that housing needs are appropriately addressed for the newly formed jurisdiction.

I. Lead Agency - Transportation Air Quality Attainment

Per the National Clean Air Act Amendments (1990) and the San Joaquin Valley Air Pollution Control Plan adopted by the San Joaquin Valley Air Pollution Control District, SJCOG serves as joint lead agency for transportation/air quality attainment in San Joaquin County. SJCOG has signed a joint Memorandum of Understanding with SJ Valley Air Pollution Control District, other Metropolitan Planning Organizations, and Local Transportation Commissions in San Joaquin Valley to coordinate transportation/air quality planning.

J. San Joaquin County Multi-Species Habitat Conservation Plan

SJCOG invested over seven years in the development of the San Joaquin County Multi-Species Conservation Plan. The plan designates a subsidiary of the Council of Governments, SJCOG, Inc., as the implementing agency of plan activities. The plan calls for the mitigation of approximately 100,000 acres of development through the acquisition of conservation easements over a 50-year period.

### III. THE REGIONAL PLANNING PROCESS

The San Joaquin Council of Governments is truly a coordinating agency and has developed a review process that is inclusive and comprehensive. While this structure deals primarily with transportation issues, it is also used for housing, air quality, and airport land use planning issues as well. The primary committees are listed below; however, various advisory committees, working groups, or task forces are also created to deal with specific issues or projects. An example is the RTP/SCS Working Group that assists SJCOG staff with technical and policy questions during development of the plan and implementation activities once the plan is adopted.

A. Technical Advisory Committee (TAC)

This 24-member committee meets monthly to review SJCOG staff working documents and advise the SJCOG Board on regional transportation and planning matters. The membership is composed of local community development and public works department staff, staff from San Joaquin Regional Transit District, Caltrans, San Joaquin Valley Air Pollution Control District, Port of Stockton, and Stockton Metropolitan Airport.

B. Management and Finance Committee (M&F)

This is a 11-member committee composed of each City Manager/Administrator, the County Administrator, the San Joaquin Regional Transit District General Manager, and the Executive Director of the San Joaquin Regional Rail Commission. The committee's function is to advise the SJCOG Board on administrative and financial decisions with a comprehensive look at all local government functions. The Management and Finance Committee also serves as the *Transit Ad Hoc Committee* to assist in developing, vetting, and offering recommendations to the SJCOG Board on matters of transit financing and proposed funding policy.

C. Citizens Advisory Committee (CAC)

The CAC is composed of seventeen interested lay people who are residents of San Joaquin County. Nine represent each of the cities in the county and San Joaquin County and are appointed by the SJCOG Board member from that jurisdiction. The remaining eight members are nominated by special interest groups and approved by the SJCOG Board. The committee's primary function is to advise the SJCOG Board in its role as the Local Transportation Authority and to provide community input on project priorities and other matters pertaining to the Measure K program.

D. Social Services Transportation Advisory Council (SSTAC)

The Social Services Transportation Advisory Council is composed of citizens and staff from various agencies and each jurisdiction. The committee's purpose is to advise the Board on issues relating to transit and to monitor and promote improvements to public transportation services for people traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e. Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups. The committee, created to meet requirements in state law, includes representatives of the elderly, the poor, the disabled, and social service agencies that serve these and other transit-dependent persons. The San Joaquin Council of Governments also holds public hearings and is active in making presentations on its work throughout the county.

E. Interagency Transit Committee (ITC)

This committee is comprised of public transit operators from throughout the county. This committee focuses on transit planning, programming, and financial activities of common interest to the operators as well as transit capital project delivery. It is the first committee to formulate proposals concerning regional transit programming and financial matters. The committee also serves as an information exchange concerning transit operational coordination items. Proposals and recommendations made by ITC are summarized by COG staff and submitted to M&F and Board for approval.

F. Project Delivery Committee (PDC)

The Project Delivery Committee is also responsible for reviewing and making recommendations to the SJCOG Board regarding policy and procedural issues affecting the management of Measure K and Measure K Renewal projects.

G. Habitat Technical Advisory Committee (HTAC)

The committee reviews and makes recommendations to the SJCOG, Inc. Board regarding the implementation of the Habitat Plan, including alternative habitat preserve acquisition methods. The HTAC meets on the second Wednesday of every month and the meetings are open to the public.

H. Goods Movement Task Force (GMTF)

The GMTF is comprised of representatives from member agencies, State Department of Transportation, Port of Stockton, California Highway Patrol, California Trucking Association, Railroad Operators, and other private/public stakeholders with an interest in Goods Movement. As an advisory committee, it meets on a regular basis specifically on goods movement issues (e.g., STAA Terminal Access, Port Access, safety) and related studies from a regional and interregional focus.

#### **IV. THE OVERALL WORK PROGRAM**

The Overall Work Program (OWP) is a management tool identifying the tasks and products that the Council of Governments will undertake or deliver during fiscal year 2025/26.

The OWP identifies the funding sources and staff resources necessary to complete the Overall Work Program.

#### **V. FUNDING SOURCES**

The San Joaquin Council of Governments' anticipated sources of funding are described below.

A. Federal Funding Sources

Consolidated Planning Grant Funds - This program combines Federal Highway Administration planning funds and Federal Transit Administration planning funds for more efficient administration of those funds. Individually, those two federal funding sources are:

PL Funds - These are dollars made available by the Federal Highway Administration (FHWA) for Metropolitan Planning Organizations. The funds are

allocated based on a statewide apportionment and are meant to carry out Federal urban planning requirements and interests. The formula for PL funds is divided into three components: 1) a base allocation, 2) an air quality component based on the proportion of CMAQ funds to total programmatic PL fund sources, and 3) a population component which distributes funds by proportion of total population of each MPO region.

Federal Transit Administration (FTA) Funds – FTA is the federal agency responsible for federal public transit investments. There are generally four sources of FTA funds used in this area:

- Section 5303 are planning funds made available to the Metropolitan Planning Organizations to support transit planning in urbanized areas.
- Section 5304 planning funds are administered as Strategic Partnership – Transit grants under the broader category of Caltrans Sustainable Transportation Planning Grants.
- Section 5313/5314 Planning and Research Grants are planning funds that the State allocates for special transit planning projects.
- Section 5307 federal funds are made directly available to transit operators for operating expenses including planning.
- Section 5316/5317 are federal funds made available for projects derived from locally developed Coordinated Public Transit-Human Services Transportation Plan.

Various Federal Planning and Infrastructure Grants – SJCOG strategically applies for federal grant funding from a wide variety of sources. Examples of awarded grants from previous fiscal years include:

- Competitive Charging and Fueling Infrastructure (CFI) Discretionary Grant Program through Federal Highway Administration (FHWA).

#### B. State Funding Sources

Transportation Development Act (TDA) - State Transit Assistance (STA) - SJCOG policy apportions 2% of State Transit Assistance funds for transit planning purposes.

Various State Planning Grants - SJCOG receives grants from the State of California to conduct specific planning projects. For FY 2025/26, this includes funding from:

- Senate Bill (SB) 1 formula-based Sustainable Communities grants from the Sustainable Transportation Planning Grant Program
- Regional Early Action Program (REAP) 2.0 grant funding from California Department of Housing and Community Development (HCD)
- Clean Mobility Options (CMO) Voucher Pilot program, also from CARB
- Strategic Growth Council (SGC) grant funding in the amount of \$1.75 million to set up a regional climate collaborative in San Joaquin County.

These funding sources are more thoroughly described in their individual work elements.

Freeway Service Patrol - SJCOG receives funding from the State of California to operate the Freeway Service Patrol on specific highways in the county.

Proposition 1B - The State of California passed a \$19.9 Billion transportation infrastructure bond in November 2006. San Joaquin County has received allocations for specific projects including widening State Route 99 and I-5, constructing auxiliary lanes on Interstate 205, extending SR 4 west of I-5, and dredging by the Port of Stockton of the San Joaquin River.

SB-1 – Senate Bill 1, the Road Repair & Accountability Act of 2017, includes a Sustainable Communities Formula Grant Program which allocates \$12.5 million annually to Metropolitan Planning Organizations (MPOs). The grant funds are primarily for projects and plans for reductions in greenhouse gas emissions (GHG) and vehicle miles of travel (VMT) and/or to integrate land-use and transportation planning. Eligible expenditures include development of and implementation of activities for the Sustainable Communities Strategy (SCS) element of the Regional Transportation Plan (RTP). Only MPOs have access to these funds, which are allocated by formula to all eligible MPOs.

### C. Local Funding Sources

Transportation Development Act - Local Transportation Fund (LTF) - These are funds derived from the Transportation Development Act used by SJCOG to carry out planning in the region and administration of the Transportation Development Act. SJCOG policy is to apportion 2.9% for planning purposes. Special assessments for specific planning projects are also approved on a year-to-year basis. TDA Administration is funded 100% by these funds.

Member Jurisdictions - Occasionally SJCOG will undertake a special study for a local jurisdiction. That jurisdiction will either directly pay for the SJCOG study or provide whatever matching funds are required to pay for the study.

Fees - SJCOG charges fees for certain functions such as the Airport Land Use Commission reviews, Regional Transportation Impact fees, and Habitat Conservation Plan fees. SJCOG also charges fees for special events such as the One Voice® trip.

Local Transportation Authority (Measure K/Renewal) - In November 1990 San Joaquin County voters passed a 20-year ½ cent sales tax to fund specified transportation projects. SJCOG's administration (salaries and benefits) of that program statutorily cannot exceed 1% of receipts. Project planning and management to coordinate and deliver specific Measure K projects are funded, as well. In November 2006, San Joaquin County voters approved an extension of the Measure K Program. The extension went into effect in April 2011 and continues for 30 years, until March 31, 2041.

Air Pollution Control District grants - The San Joaquin Valley Unified Air Pollution Control District allocates funds raised from a \$19.00 special excise fee on vehicle registrations. These funds go to operate the District as well as pay for special projects that enhance the District's mission of improving air quality in the Valley.

CalSAFE - The California Service Authority for Freeway Emergencies/Expressways

was established by the State Legislature to implement a program to enable motorists in need of aid to obtain assistance. The program is supported by a one dollar per vehicle registration annually to fund motorist aid services. The San Joaquin Council of Governments is a member of the SAFE program for San Joaquin County, which is operated by the Sacramento Area Council of Governments (SACOG). This program funds call boxes and the 511 Traveler Information System in San Joaquin County and provides matching funding for Freeway Service Patrol operations in SJC.

## **VI. SJCOG STAFFING**

The Council of Governments staff consists of an Executive Director and an additional 34 professional and support positions. SJCOG often hosts interns or fellows through outside organizations in addition to the full-time professional staff. The agency is an equal opportunity, at-will employer. The agency hires consultant services to carry out specified projects and has adopted Disadvantaged Business Enterprise goals consistent with the Code of Federal Regulations, Title 49, part 23.

## **VII. SAN JOAQUIN COUNTY REGIONAL ISSUES**

*Overview of Trends:* San Joaquin County's population has been steadily increasing for decades and is consistently one of the fastest-growing counties in the state. According to the California Department of Finance population estimates January 2023 to January 2024, San Joaquin County grew at an annual rate of 1.0% and ranked sixth for all California counties in year-over-year percentage increase. The total county population estimate for January 2024 was 791,408. According to recent population projection by the Center for Business and Policy Research at University of the Pacific, this growth rate is expected to continue in the near term, tapering off beginning in 2025 and dropping to less than 1% in the later years of the forecast (through 2050). The average annual growth rate over the time period from 2025-2050 is projected at 0.76%. However, the expectation is that San Joaquin will remain one of the fastest-growing regions within the state's 58 counties. Comparatively, population growth rates for the state and nation are currently less than 1% and declining.

Future population growth in San Joaquin County is supported by several intersecting factors: including proximity to Bay Area economic centers, greater affordability versus neighboring counties, and continued economic diversification and expansion, as well as robust natural increase. While previous forecasts had the San Joaquin County population surpassing the one-million mark between 2045 and 2050, growth rates have slowed to the point where the one-million mark will not be reached by 2050.

By 2015, San Joaquin County had mostly rebounded from the Great Recession of 2008. While the recession exacerbated certain historical traits of the county, San Joaquin County has shown significant improvements in unemployment, job growth, and economic expansion over the intervening five years through 2020 – reaching and exceeding pre-recession employment levels. Employment within the county is expected to increase at an annual rate 0.66% from 2025-2050, with health care jobs and the transportation and warehousing sectors continuing to lead job growth. Notwithstanding the positive improvements in the county, San Joaquin County faces problems similar to many of

California's interior regions: higher unemployment and poverty levels than both state and national averages, rapid urbanization, infrastructure constraints, environmental and quality of life concerns, mobility and congestion challenges for the movement of both people and goods, and the desire to expand economic opportunities while addressing all these challenges.

As the 2025/26 fiscal year approaches, the county has largely recovered from the global pandemic and the associated economic fall-out but is grappling with an exacerbated and worsening housing shortage. SJCOG will continue to monitor and analyze the lasting economic impacts of the pandemic and other emerging challenges on population, housing, transportation, and economic indicators to inform policy and project delivery needs. Below are example strategies designed to address these concerns that the San Joaquin Council of Governments will implement in this Overall Work Program.

#### A. Regional Transportation System

San Joaquin County (SJC) is strategically located in Northern California's dynamic growth corridor and is often defined as the eastern gateway to the Bay Area. The county has become a de facto part of the Bay Area by virtue of its geographic location and the migration of workers and companies from the Bay Area. In fact, in 2013, the federal government added San Joaquin County to the San Jose-San Francisco-Oakland Combined Statistical Area reflective of San Joaquin County's prominent role in the larger Bay Area economy. San Joaquin County is prominently positioned to expand its role in the "mega-region" because of expansion and diversification of local employment sectors, proximity to Bay Area economic centers, lower cost of living, and higher quality of life.

A highly accessible highway transportation system links SJC to major California destinations. The county is a major Northern California transition point with two primary north-south highways, Interstate 5 and SR 99. They are connected by the Stockton Crosstown Freeway (SR 4) in the center of the county and SR 120 through Manteca in the south. Interstate 5 is the main north-south route for transportation along the west coast from Canada to Mexico. State Route 99 is the main inland route through California connecting major cities in the San Joaquin Valley. I-205 through the city of Tracy connects to I-580 over the Altamont Pass and into the greater San Francisco Bay Area.

The principles of "sustainable communities" and "smart growth" remain integral to the implementation of the OWP. SJCOG, through the inclusion of a Sustainable Communities Strategy in its Regional Transportation Plan effort, will foster coordinated planning with neighboring cities, counties, and other governmental entities to agree upon regional strategies and policies for dealing with the regional impacts of growth on transportation, housing, and the environment. Supporting this effort will also involve the implementation of the region's Smart Growth Incentive Program (SGIP) which is part of the Measure K Renewal program and SJCOG's compliance with SB 375, as well as new work elements supporting regional housing programs and transportation equity activities. SJCOG's newly formed San Joaquin Regional Housing Fund has been designed to encourage housing growth and provide much needed funding support for affordable and workforce housing in the region.

The transportation planning work elements that deal with transportation infrastructure issues include:

- Regional Transportation Plan
- Regional Transportation Plan Studies
- Transit Planning and Coordination Studies
- Regional Transportation Improvement Programs
- Regional Congestion Management Program
- Measure K Transportation Sales Tax Program
- Regional Transportation Impact Fee (RTIF)
- Clean Mobility Options (CMO) Grants
- REAP (Regional Early Action Program) 2.0

While each of these work elements deals with different components of transportation infrastructure, each attempts to focus investments into cost-effective and environmentally sound transportation improvements.

#### B. Air Quality

San Joaquin County sits at the northern end of the San Joaquin Valley air basin. This air basin has geographical and meteorological conditions that make air quality an issue of major concern. San Joaquin County, excluding the Stockton urbanized area, is in attainment for carbon monoxide. The Stockton urbanized area has been designated by the Environmental Protection Agency as a maintenance area since 1998. San Joaquin County is included in the San Joaquin Valley non-attainment area for ozone, which is classified as extreme for the 8-hour Ozone standard. The air basin has been classified as non-attainment for the PM<sub>2.5</sub> standard and maintenance for PM<sub>10</sub>. Work Elements addressing this concern in this year's work program are:

- Regional Transportation Plan
- Transportation Air Quality and Modeling.

On September 27, 2006, Governor Schwarzenegger signed AB 32, the Global Warming Solutions Act. The act caps California's Greenhouse Gas (GHG) emissions at 1990 levels by 2020. This legislation represents the first enforceable state-wide program in the U.S. that includes penalties for non-compliance to cap all GHG emissions from major industries. This law requires the State Air Resources Board to establish a program for statewide greenhouse gas emissions reporting and to monitor and enforce compliance with this program. In 2008 the Legislature also passed SB 375, which is a companion bill to AB 32. SB 375 focuses on potential greenhouse gas reductions through land use and transportation actions. The provisions of SB 375 have been a significant component of SJCOG's planning and policy development. However, it is important to note that sustainability goals are not new to SJCOG's mission which has always included implementation of projects supporting sustainability and preserving environmental quality.

The San Joaquin Council of Governments conducted a comprehensive travel model update to improve the effectiveness of modeling data for transportation and air quality analysis in 2013 and continues to refine and improve its modeling capabilities. A more

comprehensive model update will be considered this fiscal year in tandem with 2026 RTP/SCS development. Robust and technically sound modeling analyses empower policy makers to make transportation investments that produce the greatest impact to improve air quality.

The current model was used for the first time in the development of the Regional Transportation Plan (RTP) in 2014. Prior to the 2018 RTP update, the model was further updated to include new calibrations and technical refinement. It has been used in assessing the performance of the 2018 and 2022 RTPs by quantifying the impacts of various air quality strategies, for assessing the regional transportation impacts of land use decisions as part of SJCOG's congestion management process, in assessing fair share analyses for the Regional Transportation Impact (RTIF) program, and performance measurement and management requirements.

SJCOG is committed to expanding and strengthening the conformity process and the coordination on valley-wide transportation modeling. Furthermore, as more direction comes forward, SJCOG will continue to incorporate the needed methodologies to meet the intent of, and updated guidance for, AB 32 and SB 375 to lower GHG emissions.

### C. Single Occupancy Vehicle (SOV) Usage

A key focus for SJCOG is providing the public with more mobility options to reduce the incidence of SOVs. The use of Transportation Demand Management (TDM) strategies such as improving the access to public transit and the use of vans and carpools are essential to reduce the incidence of SOV usage. TDM strategies are necessary to prevent and reduce congestion in the regional transportation system. These strategies have a direct impact on improving air quality.

## **Public Transportation**

### *Bus Systems*

Transit systems relevant to this work plan are the local, intercity, interregional, and dial-a-ride bus services, currently operating in San Joaquin County. Transit also includes needed services such as demand response for both those who need transit for medical purposes and those in rural areas (general public dial-a-ride). All cities and unincorporated areas in San Joaquin County are served by a public transit system. These systems range from an extensive bus fleet system operated by the San Joaquin Regional Transit District (RTD) to the single bus operated by the City of Ripon. Some cities have begun to incorporate on-demand car-sharing and micro-transit services to increase transportation availability.

There are several types of public transit services currently operated by RTD and the cities in San Joaquin County: 1) general public fixed-route; 2) general public dial-a-ride; 3) general public route-deviation; and 4) and paratransit dial-a-ride.

The 2010 census streamlined public transit planning and programming in San Joaquin County. The more recent 2020 census reflected increasing urbanization in the county, with

the Tracy UZA now the larger Tracy-Mountain House UZA, and the cities of Ripon and Escalon now stand-alone UZAs.

### *Passenger Rail Transportation Systems*

San Joaquin County sits as the rail linchpin for the State of California. All the major existing freight rail lines connecting the San Francisco Bay Area and Los Angeles run through San Joaquin County. All the major rail lines, except for the Coast route, connecting southern and northern California, run through San Joaquin County.

The Altamont Corridor Express (ACE) is in its third decade of service operating between downtown Stockton and Diridon Station in downtown San Jose. Having recently celebrating 25 years in service, ACE continues to focus on improvements to individual stations, trackage, and signal improvements to upgrade service and passenger-targeted services such as Wi-Fi access, special event trains, and onboard educational programs.

The San Joaquin Regional Rail Commission (SJRRRC) is responsible for the ACE service and acts as the San Joaquin Joint Powers Authority to operate the Amtrak San Joaquín's service. SJRRRC is currently implementing Valley Rail. Valley Rail is a phased improvement plan to increase service reliability and frequency, enhance passenger facilities, reduce travel times along the existing ACE service corridor from San Jose to Stockton, and extend ACE service to Manteca, Ripon, Modesto, Ceres, Turlock, and Merced as well as Sacramento to the north. The final Environmental Impact Report (EIR) for the Valley Rail project was adopted by the commission in October 2020, with. The EIR provides the foundation for SJRRRC's near-term and longer-term vision of intercity and commuter passenger rail services.

In 2017, AB 758, authored by Assembly member Susan Eggman, created the Tri-Valley-San Joaquin Valley Regional Rail Authority. The Authority is tasked with managing the planning and construction of rail connectivity between the Bay Area Rapid Transit (BART) system and ACE. It has examined the feasibility of diesel multiple units (DMU)/electrical multiple units (EMU) rail systems and proposed alignments for the Dublin/Pleasanton BART station and the San Joaquin County communities of Tracy, Lathrop, and Stockton. More recently hydrogen fuel cell technology is being explored. In January 2018, the newly established authority, branded Valley Link, held its first meeting and shortly thereafter embarked on a feasibility report. In October 2019, the Authority approved the feasibility report. A draft EIR was circulated in 2020 for public review; the final EIR was adopted May 2021, allowing the project to move forward with preliminary engineering and to seek construction funding.

### *Van Pools, Rideshare, Biking, and Walking*

Other TDM strategies involve organizing residents, businesses, and employees to develop and connect people in commuter van pools and automobile ridesharing. Other means to get from an origin to a destination involve walking and riding bikes. In addition, in FY 17/18, the SJCOG Board approved approximately \$20 million of bicycle/pedestrian/safe routes to school projects and smart growth projects for the San Joaquin region. This was funded from the Measure K half-cent sales tax program, advancing several years of Measure K funds. This enabled the rolling out of the largest

program of TDM projects in a single call for projects and a larger-scale infusion of benefits from these investments to the region. This strategy for funding was continued in the FY 2024-25 work program with the Active Transportation Program (ATP) cycle 7 call for projects. \$14 million in bike and pedestrian projects are expected to be programmed in the 4<sup>th</sup> quarter of the FY 24/25 and the strategy will carry over into the upcoming fiscal year.

## Congestion Management

The Regional Congestion Management Process (RCMP) for San Joaquin County reflects a renewed vision of the future of travel in our region. The RCMP is designed to combat congestion and its impacts on economic development by employing strategies that focus on a broad set of supply-side and demand-side strategies to reduce solo driving trips. These strategies include more pro-active land use and pricing policies, coordinated investment in alternative modes of transportation, and new incentives for getting people out of their cars.

### D. Transportation Authorization

SJCOG was an active partner in statewide implementation of previous transportation spending authorizations, including MAP-21 legislation (signed into law in July 2012) and its successor, Fixing America's Surface Transportation Act or "FAST Act" (signed into law in December 2015 and extended in 2021). With the passage of the Infrastructure Investment and Jobs Act (IIJA), SJCOG continues this legacy of partnership with regional, state, and federal partners as guidelines and rulemaking are developed to implement new programs or morph existing programs. The agency will actively pursue opportunities to sponsor training sessions, workshops, and forums for member agencies to ensure the region is in full compliance and takes full advantage of the largest transportation authorization in American history. Planning studies have been designed to show the region's readiness for project funding program criteria expected as part of the continuing roll-out of the IIJA. As of the writing of this OWP, a new long-term transportation authorization is expected, but its focus and priorities are currently unknown.

### E. Goods Movement

The movement of goods is essential to the economic good of the region. San Joaquin County is geographically considered an interregional goods movement hinge point for California due to its relationship with the San Francisco Bay Area and the Greater Sacramento Area. The Port of Stockton, located in the City of Stockton, is comprised of warehouse storage and handling facilities. It is centrally located and handles national and international products and cargo traveling to the Port via highways, railways, and waterways. Also notable, San Joaquin County is home to two Class I railroads, Union Pacific (UP) and Burlington Northern Santa Fe (BNSF), the Port of Stockton and the Stockton Metropolitan Airport, which is one of the most active airports in the Central Valley supporting air cargo traffic. SJCOG has actively worked with regional partners, the airport, and the Port of Stockton to compete for additional funding and enhance operations at both of these important goods movement hubs.

San Joaquin County is the farthest north region in the Central Valley Trade Corridor

which has the greatest amount of truck traffic volume in the state. The region is a major producer of grapes, milk, cherries, tomatoes, almonds, and walnuts. Goods movement industries include the following: ranching, food processing, fruit, and vegetable farming ( comprised of companies such as B&B Ranch, Pacific Coast Producers, and Morada Produce Company). Most recently the county has become a regional hub for warehousing and logistics companies – this sector has produced 50% of the county's job growth in the last several years. As retail trade increasingly moves towards e-commerce, goods movement in and out of the county will continue to be an important factor in the growth of regional travel demand.

San Joaquin Council of Governments will continue to staff and host the Goods Movement Task Force (GMTF) which has become an important advisory committee to SJCOG and its partners. The committee is very involved in the Intermodal Goods Movement Management System.

## **VIII. FEDERAL PLANNING EMPHASIS AREAS**

Planning emphasis areas (PEAs) are policy, procedural, and technical topics that should be considered by Federal planning fund recipients when preparing work programs for metropolitan and statewide planning, and research assistance programs.

In December 2021, the Federal Transit Administration (FTA) and Federal Highway Administration (FHWA) Region IX issued new Federal Planning Emphasis Areas (PEAs). These PEAs were first incorporated in the FY 2023/24 OWP. They represent the most recent guidance available and will carry over for the FY 2025/26 OWP. They are listed below: Each PEA listing notes specific examples of SJCOG's efforts for each area of emphasis, followed by a table of work elements in the OWP and whether it has elements or tasks designed to advance the goals of each area of emphasis.

1. Tackling the Climate Crisis – Transition to a Clean Resilient Future: this planning emphasis area is designed to ensure that regional transportation plans and subsequent infrastructure investments help achieve national greenhouse gas emissions. Given that MPOs in California have been preparing Sustainable Communities Strategies (SCSs) as part of their long-range planning documents for a decade, there are multiple work elements that addressed this PEA in the last fiscal year and are further advanced in this work program. Highlights are:

- WE 601.01 – Regional Transportation Plan: Adopted in August 2022, the current RTP/SCS includes multiple strategies to support implementation of the goals in this PEA, including energy efficiency through coordinated land-use and transportation choices; improving air quality by reducing transportation-related emissions; encouraging infill near transit; facilitating nonmotorized travel; improving network resilience and adaptation to climate impacts; promoting use of electric power and alternative fuels for transit, freight, agriculture, and private vehicles; supporting high-speed internet infrastructure as a way to reduce commuting. There will be sustained focus in this work element for the FY 2025/26 fiscal year as SJCOG completes work on the 2026 RTP/SCS update.

In the 24/25 work program for this work element, SJCOG will be furthering existing studies supporting this PEA and developing an implementation blueprint for new strategies.

- WE 601.017 – With the completion of the Comprehensive EV and Alternative Fuels Vision Plan in FY 23/24, SJCOG has set the stage for substantial investment in electrical vehicle charging and other alternative fuels infrastructure in the county. While this work element has closed out, this study was instrumental in securing the \$15 million dollar CFI grant to install electrical charging infrastructure countywide. The CFI grant and its deliverables are listed as work element 1382.01. This will be an important area of focus for SJCOG in the coming fiscal year as SJCOG expands its efforts for alternative fuels, charging, and workforce development to encourage electrification.
- WE 601.0181 – The Future of Travel Demand Management Policy & Program Development. This study, begun in FY 2023/24, is slated for completion in the at the onset of the 25/26 fiscal year. It focuses on innovative new models for increasing the effectiveness of SJCOG's travel-demand program, to expand and enhance the success of existing vanpool and carpool programs with electric vehicle technology and explores development of neighborhood or community-level transportation hubs. As the study closes out, the recommendations will be implemented during FY 25/26.
- WE 1375.01, 1379.01, and 1380.01 – Sustainable Transportation Equity Program (STEP) and Clean Mobility Options (CMO): these work elements have worked in tandem to bring EV car-share and EV bike-share programs to disadvantaged communities in Stockton. These grant programs are multi-year pilot programs – with the STEP project concluding in FY 24/25. An area of focus for these two programs will be the development of a sustainable funding plan and securing funding for expansion and enhancement of these successful services. Both CMO programs will continue to expand these important services during the FY25/26 fiscal year.

2. Equity and Justice 40 in Transportation Planning: This PEA seeks to advance racial equity and support for historically disadvantaged and underserved communities. Strategies are to improve non-motorized travel and access to transportation, plan for safety of road users, reduce single-occupancy vehicle travel and pollution for communities near high-volume roadways, offer reduced public transportation fares, target demand response to areas with concentrations of older adults and those with poor access, and consider equity when developing transit-oriented development and affordable housing strategies. While equity is integral to SJCOG's overall work program, highlights of specific programs are:

- WE 601.017 – Social Equity Planning Project: This study, which kicked-off in FY 22/23 concluded in February 2024. The study included examination of current programs, procedures, planning projects, and outreach to explore the effectiveness of equity-focused efforts by the agency. The study conclusions and recommendations for next steps will be incorporated into programs and policies within the agency with the assistance of a social equity working group.

Implementation of the action plan from this study will continue in FY 2024/25 and FY 2025/26 and will aid SJCOG in implementing this PEA and implementing robust community engagement processes for the 2026 RTP/SCS.

- WE 1375.01 – Sustainable Transportation Equity Program (STEP): This now completed suite of pilot programs not only focused on reducing greenhouse gas emissions through electric-vehicle car sharing but also included a pedal-assist bike-share component, a workforce development component, and a mobility incentives component. All components worked in tandem to increase clean mobility options, increase access, and reduce the cost burden of transportation in one of Stockton’s most disadvantaged communities. As a regional model for increasing clean mobility access in historically disadvantaged communities, SJCOG has been evaluating opportunities to expand the programs throughout the county during FY 24/25 and FY 25/26 as new funding sources have been identified.
- WE 1382.01 – San Joaquin Regional Climate Collaborative (RCC): Funded by the Strategic Growth Council, this \$1.7 million grant is a collaboration with local environmental justice and community coalition partners, combined with University of the Pacific. The collaborative is an outgrowth of recommendations from a previous SB1-funded study for climate adaptation guidance and a local agency toolkit. The number one recommendation is to, through a formal collaboration, develop community-led solutions and projects through current research data, to anticipated climate-related impacts in San Joaquin County’s most disadvantaged communities. This work continued through FY 24/25 and will accelerate in FY 25/26.

3. Complete Streets: This PEA, while not new in concept, looks to expand safety considerations for future transportation infrastructure, particularly outside of automobiles, by examining safety efficacy for current policies, rules, and procedures for all road users. Besides SJCOG’s track record for maximizing bike and pedestrian funding through combining Active Transportation Program (ATP) funds with local dollars through the Measure K half-cent sales tax program, this OWP also includes:

- WE 601.0181 – Innovations in Bike & Pedestrian Project Delivery: this study, begun in FY 24/25, will expand on previous studies in looking at neighborhood and community-level bicycle and pedestrian needs through a robust data-driven approach. The goals will include linking disparate project concepts into integrated corridor planning deliverables, links to STEP project bike-sharing hubs, first- and last-mile linkages to transit, and integration with priority housing areas in each jurisdiction. The study will also look at regional-level connectivity and make recommendations for policy or procedural changes that may increase funding opportunities region-wide.

4. Public Involvement: This PEA specifically calls out the use of innovative virtual tools to increase meaningful public involvement in transportation planning through Virtual Public Involvement (VPI) tools. In the 2022 RTP/SCS (WE 601.01), outreach for plan development had just begun when the global pandemic in early 2020 halted all in-person meetings. SJCOG quickly deployed a variety of effective virtual meeting tools. SJCOG’s

public participation plan update was updated in FY 24/25 and as public engagement for the 2026 RTP/SCS is developed, VPI will be incorporated, with virtual tools continuing to be a vital part of SJCOG's outreach portfolio.

5. Strategic Highway Network (STRAHNET)/U.S. Department of Defense (DOD) Coordination: this PEA calls for enhanced coordination with DOD representatives for transportation planning and project programming on STRAHNET routes and other public roads connecting DOD facilities. Several of these facilities exist in the SJCOG region – all are vital goods movement and commute corridors throughout San Joaquin County and to other parts of the state and nation. Of particular importance is the connectivity provided to the Port of Stockton and Stockton Metropolitan Airport. As appropriate DOD representative input will be sought for relevant projects and programs and current maps and studies from the Power Project Platform (PPP) will be reviewed and incorporated into SJCOG's project delivery procedures and processes.

6. Federal Land Management Agency (FLMA) Coordination: The intent of this PEA is to encourage coordination with Federal Land Management Agencies for transportation projects and programs affecting access and connectivity to federal lands. This includes Tribal Lands, as well as other federally owned installations such as military bases. San Joaquin County does have substantial lands under federal ownership; however, SJCOG maintains a Tribal notification database and coordinates as appropriate with other FLMAs.

7. Planning and Environmental Linkages (PEL): This emphasis area encourages an integrated approach to transportation decision-making that makes environmental, community, and economic goals an early part of the planning process that will later inform the formal environmental review stage of project development. SJCOG staff and its consultants regularly consult our public agency partners and stakeholders in the early stages of project development – this is also true of the many planning studies that are undertaken ahead of project development. SJCOG staff will review and incorporate the PEL process as part of all future planning and project delivery processes at the agency.

8. Data in Transportation Planning: In an effort to address ever-emerging data sharing, modeling, needs, and other analytic assessments, MPOs are encouraged to incorporate data-sharing considerations into the transportation planning processes. Considerations should include principles and data management for a variety of issues such as freight, bike, and pedestrian planning, equity analyses, performance management, mobility services, and others. SJCOG has used a variety of data sets and data sources over time – most recently sharing an economic modeling platform (Regional Economic Model Inc.) with the Metropolitan Planning Commission (MTC) to encourage data sharing across connected MPO areas. In the FY 23/24 work program, SJCOG will continue to develop its data acquisition and sharing capacities through the following highlighted programs:

- WE 601.018: Data Sharing and Analytics for Planning: the planning process, kicked-off during FY 22/23 completed in FY 24/25 utilizing SB1 planning funds to acquire data sets for the set-up of a formal data sharing and analytics program at SJCOG. SJCOG has also worked closely with the Data Science program at University of the Pacific to partner with student teams to analyze various data sets for insights into program effectiveness and other important metrics.

- WE 601.0181: Innovations in Bike & Pedestrian Project Delivery: one aspect of this SB1-funded study will include acquisition and deployment of robust data sets to inform bike and pedestrian infrastructure project delivery in the SJCOG region. With the project kicking off in FY24/25, the majority of the work and deliverables will be completed in FY25/26.

In addition to the highlights presented, the following table matches work elements with the federal planning emphasis areas.

2025/26 Work Elements by Federal Planning Emphasis Areas:

Work Elements	Emphasis Areas							
	1	2	3	4	5	6	7	8
601.01	✓	✓	✓	✓	✓	✓	✓	✓
601.0181	✓	✓	✓	✓				✓
601.0182	✓	✓	✓	✓	✓			✓
601.0183	✓	✓	✓	✓				✓
601.019	✓	✓	✓	✓	✓	✓	✓	✓
601.02	✓	✓	✓	✓	✓	✓	✓	✓
602.01	✓	✓	✓	✓	✓	✓	✓	✓
602.02	✓	✓	✓	✓			✓	
603.01	✓	✓	✓	✓	✓	✓	✓	
603.015	✓	✓	✓	✓	✓	✓	✓	✓
603.018	✓	✓	✓	✓	✓	✓	✓	✓
603.02	✓	✓	✓	✓	✓		✓	✓
603.0201	✓	✓		✓	✓	✓		✓
603.0202	✓	✓	✓					✓
603.0203	✓	✓	✓		✓		✓	✓
603.021	✓							✓
603.03	✓	✓			✓		✓	✓
603.04	✓	✓		✓	✓			✓
701.01	✓	✓	✓					✓
801.01	✓	✓	✓	✓	✓	✓	✓	✓
801.02	✓	✓		✓			✓	✓
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	✓	✓	✓	✓			✓	✓

In addition to these federal planning emphasis areas, CFR 450, Subpart C, provides additional guidance in the development of overall work programs. In response, SJCOG has developed:

#### 1. Core Planning Functions

SJCOG's Overall Work Programs (OWP) identifies the core planning functions and what work will be done during the program year to advance those functions. These core functions are drawn from 23 CFR 450, Subpart C, and include:

- Overall Work Program
- Public Participation and Education
- Regional Transportation Plan
- Federal Transportation Improvement Program
- Congestion Management Process (required for TMAs)
- Annual Listing of Projects

Transportation legislation provided metropolitan transportation planning program funding for the integration of transportation planning processes in the metropolitan planning area, or MPA (i.e., rail, airports, seaports, intermodal facilities, public highways, and transit, bicycle, and pedestrian, etc.) into a unified metropolitan transportation planning process, culminating in the preparation of a multimodal transportation plan for the MPA. The FHWA and FTA request that all MPOs review the OWP development process to ensure all activities and products mandated by the metropolitan transportation planning regulations in 23 CFR 450 are a priority for FHWA and FTA combined planning grant funding available to the region. The MPO OWP work elements and subsequent work tasks must be developed in sufficient detail (i.e., activity description, products, schedule, cost, etc.) to clearly explain the purpose and results of the work to be accomplished, including how they support the Federal transportation planning process (see 23 CFR 420.111 for documentation requirements for FHWA Planning funds).

SJCOG's OWP has been developed to address the core planning functions and provides the necessary work element and work task details to clearly explain both the purpose and results of the work to be accomplished. In addition to the explanation identified in each work element narrative of how these work elements and work tasks support the Federal transportation planning process, SJCOG's OWP includes a specific section highlighting how the OWP addresses the planning factors.

A few examples of SJCOG's core planning functions include:

- Development and updating of the OWP.
- Public participation and education.
- Updating and implementation of the Regional Transportation Plan/Sustainable Communities Strategy.
- Federal Annual Listing of Projects.
- Amendments to the Federal Transportation Improvement Program
- Air Quality Conformity analysis.

- Award, programming, and monitoring federal, state, and regional transportation funds.
- Data and technical planning assistance for local jurisdictions and agencies.
- Collaboration with transportation partners on planning studies and corridor planning.
- Regional transportation modeling, analysis, and monitoring.
- Coordination with San Joaquin Valley COGs (RTPAs) on regional planning.

SJCOG shares the appropriate documents and endorsements with Caltrans. Annually, as a part of the OWP adoption process, the Board makes the required certification finding, which is transmitted to Caltrans, the Federal Highway Administration (FHWA), and the Federal Transit Administration (FTA). Caltrans notifies SJCOG if there are any deficiencies in the planning process, which could result in conditional certification. In addition, Caltrans has been integrated into SJCOG-led committees, the SJCOG Board, and our working groups/steering committees on numerous studies/projects.

## 2. Performance Management

Caltrans and most of California's MPOs have developed performance measures that are included in their Regional Transportation Plans (RTPs) and Federal Transportation Improvement Programs (FTIPs). The objective of the performance- and the outcome-based program is for states and MPOs to invest resources in projects that collectively make progress toward the achievement of the national goals. MAP-21 required the DOT, in consultation with states, metropolitan planning organizations, and other stakeholders, to establish performance measures in the areas listed below:

- Safety - To achieve a significant reduction in traffic fatalities and serious injuries on all public roads.
- Infrastructure Condition - To maintain the highway infrastructure asset system in a state of good repair.
- Congestion Reduction - To achieve a significant reduction in congestion on the National Highway System.
- System Reliability - To improve the efficiency of the surface transportation system.
- Freight Movement and Economic Vitality - To improve the national freight network, strengthen the ability of rural communities to access national and international trade markets, and support regional economic development.
- Environmental Sustainability - To enhance the performance of the transportation system while protecting and enhancing the natural environment.
- Reduced Project Delivery Delays - To reduce project costs, promote jobs and the economy, and expedite the movement of people and goods by accelerating project completion through eliminating delays in the project development and delivery process, including reducing regulatory burdens and improving agencies' work practices.

SJCOG's RTP has placed an emphasis on quantitative objectives and performance measures, which help meet federal legislative requirements. The Federal Congestion Management Process component of the RTP also relates to performance management.

The CMP performance measures are used as the foundation to assess the operational

condition of the regional roadway system and assist in determining the value of proposed projects in improving the operational condition. This relationship assists in the overall prioritization of projects in the RTP which is also reflected in the CMP Capital Improvement Program and the FTIP. Examples include:

- 1) Use of all reasonable TDM strategies to mitigate trip impacts, use of applicable regional planning studies to, for example, design identified roadways to expressway and STAA standards.
- 2) Results of assessment and monitoring lead to targeted OWP activities and further targeted regional planning efforts.

### 3. State of Good Repair

MPOs are required to evaluate their transportation system to assess the capital investment needed to maintain a State of Good Repair for the region's transportation facilities and equipment. MPOs shall coordinate with the transit providers in their region to incorporate the Transit Asset Management Plans (TAMs) prepared by the transit providers into the Regional Transportation Plan (RTP). Analysis of State of Good Repair needs and investments shall be part of any RTP update and must be included in the Overall Work Program task for developing the Regional Transportation Plan. MPOs are expected to regularly coordinate with transit operators to evaluate current information on the state of transit assets; to understand the transit operators' transit asset management plans; and to ensure that the transit operators are continually providing transit asset information to support the MPO planning process.

Additionally, the MPO shall integrate into the metropolitan transportation planning process, directly or by reference, the goals, objectives, performance measures, and targets described in other state transportation plans and transportation processes, as well as any plans developed under 49 U.S.C. Chapter 53 by providers of public transportation, required as part of a performance-based program, which includes Public Transportation Agency Safety Plans (PTASP).

Through the transit planning and coordination activities identified in SJCOG's OWP, SJCOG continues to lead transit planning efforts that address transit asset management, preventive maintenance, and financing strategies for system repair and expansion. These activities are specifically coordinated through SJCOG's Interagency Transit Committee.

## **IX. FEDERAL CERTIFICATION PROCESS**

Federal urban transportation planning regulations require that SJCOG annually certify that its planning process is being carried out in conformance with all applicable federal requirements. This certification is executed with the adoption of the Overall Work Program and Budget and authorizing resolution. In essence, the certification finding to be made by the Board of Directors is based upon five factors: (1) The agency must be officially designated as the Metropolitan Planning Organization (MPO) for the San Joaquin Region; SJCOG must have (2) an adopted Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS), (3) Regional Transportation Improvement Program (RTIP) and (4)

Overall Work Program (OWP), which meet the necessary federal requirements; and finally, (5) the RTP/SCS and RTIP must be found to be consistent with the regionally-adopted air quality plan.

As the basis for determining the adequacy of compliance, SJCOG maintains on-file copies and provides Caltrans with the appropriate documents and endorsements. Annually, as a part of the OWP adoption process, the Board makes the required certification finding, which is transmitted to Caltrans, the Federal Highway Administration (FHWA), and the Federal Transit Administration (FTA). Caltrans notifies SJCOG if there are any deficiencies in the planning process, which could result in conditional certification. Caltrans, also, has been integrated into SJCOG-lead committees/Board and our working groups/steering committees on numerous studies/projects. Examples include SJCOG's Board of Directors and Technical Advisory Committee.

In addition to the annual certification, a quadrennial review is conducted by the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) to jointly review SJCOG's transportation planning process and ensure that the agency's planning activities are conducted in accordance with FHWA and FTA regulations, policies, procedures, and guidance. SJCOG underwent a quadrennial review in 2021 and was recertified in June 2021.

It should be noted that following its recent round of federal certifications of MPOs, FHWA made a finding for the state of California requiring that all MPOs cease the practice of sub-allocating federal funds to partner agencies on a formula basis. SJCOG staff put this requirement into practice, by utilizing competitive processes that make use of performance-based planning to inform funding allocation decisions.

## **X. PLANNING FACTORS**

Title 23 of the United States Code describes Federal Planning Factors issued by Congress to emphasize factors from a national perspective. These ten planning factors, first identified in the FAST Act are found in the Code of Federal Regulations (23 CFR 450).

The ten planning factors are:

1. Support the economic vitality of the metropolitan planning area, especially by enabling global competitiveness, productivity, and efficiency.
2. Increase the safety of the transportation system for motorized and non-motorized users.
3. Increase the security of the transportation system for motorized and non-motorized users.
4. Increase the accessibility and mobility of people and freight.
5. Protect and enhance the environment, promote energy conservation, improve the quality of life, and promote consistency between transportation improvement and state and local planned growth, housing and economic development patterns.
6. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight.
7. Promote efficient system management and operation.
8. Emphasize the preservation of the existing transportation system.

9. Improve the resiliency and reliability of the transportation system and reduce or mitigate storage water impacts of surface transportation.
10. Enhance travel and tourism.
1. Support economic vitality of the metropolitan planning area. The work elements and tasks included in the OWP for San Joaquin County support and enhance the economic health of the entire region. Activities focused within San Joaquin County target improvements to high-priority corridors for transit investments, congestion relief, and goods movement to maintain the economic competitiveness of the region.
2. Increase Safety. Since the passage of the Intermodal Surface Transportation Act for the 21<sup>st</sup> century in 1991, states and MPOs have been encouraged to incorporate safety and security measures in their plans, programs, and ongoing planning activities. The OWP supports the inclusion of projects and programs that enhance public safety by maintaining specific safety-related funding sources at the local, state, and federal levels. SJCOG's RTP includes goals, objectives, and performance measures concerning safety. San Joaquin County's local sales tax, Measure K, identifies funding for grade separation projects, bike and pedestrian projects, and local street repair – all of which enhance various aspects of public safety on the regional transportation system. In the same way, the State's SHOPP program and the federal safety program provide funding specific to increasing safety on the transportation system, in addition to more general State and federal revenue sources that are used for motorized and non-motorized safety projects.
3. Increase Security. As noted under the safety emphasis area, States and MPOs have been encouraged to incorporate safety and security measures in their plans, programs, and ongoing planning activities since the early 1990s. The OWP supports the security of the transportation system by providing assistance to transit agencies implementing additional security requirements for FTA grant recipients brought on by SAFETEA-LU. Such projects are included in the FTIP and the provision of ITS elements and security strategies for priority projects.
4. Increase mobility and accessibility. Increasing mobility and accessibility across the regional transportation system are the hallmarks of transportation planning and project development. Many of the transportation-related activities in the OWP have a common underlying theme of increasing the mobility and accessibility of the transportation system. As defined in SJCOG's RTP, mobility is defined as meeting the public need for improved access and safe, comfortable, convenient, and economical movement of goods and people. Accessibility focuses on minimizing the time and cost associated with accessing transportation options. While traditional transportation projects address access, travel time, and cost, SJCOG staff is also pursuing alternatives such as ramp metering and high occupancy vehicle/high occupancy toll lanes.
5. Improve the quality of life: Environmental protection, energy conservation, growth, and economic development all contribute to the overall quality of life for residents in San Joaquin County. The OWP devotes a significant number of

resources to this end. In addition to the mandated work addressing local and valley-wide air quality issues, SJCOG continues its work on the implementation of enhanced modeling activities (economic, forecasting, and travel demand) in support of the RTP/SCS development and policy implementation. Both efforts raise awareness throughout the community about the environmental impacts of growth, travel, and development.

6. Enhance the integration and connectivity of the transportation system: The OWP continues to expand the opportunities for the San Joaquin region to coordinate across and beyond regional boundaries. The Altamont Corridor Express and Regional Transit District provide increasing connectivity between travel modes, and SJCOG staff will continue its participation and collaboration on transit planning efforts and capital project delivery. An example of this collaboration is the successful regional transit planning and ticketing app known as VAMOS/EZHub. In addition, the OWP supports monitoring efforts on the San Joaquin Valley Joint Powers Authority and the Tri-Valley-San Joaquin Valley Regional Rail Authority.
7. Promote efficient system management and operation: A regionally coordinated, strategic approach to managing and operating transportation systems can yield dramatic improvements in system productivity and service cost-effectiveness. This applies both to transit services as well as traditional transportation projects. Efficient system management and operation are highlighted in the OWP through regional planning and programming efforts and project development activities. This includes integration of the federal congestion management process into the RTP/SCS and establishment of transportation demand measures as part of the CMP planning and monitoring process.
8. Emphasize the preservation of the existing transportation system: System maintenance and preservation are critical to the long-term viability of transportation systems. Under the fiscal reality of tightening transportation budgets at all levels of government, resources are needed both for system expansion and system preservation. The OWP provides support and funding mechanisms to direct necessary resources toward roadway rehabilitation and repair. Examples include the region's Measure K program funding for local street repair, the dedication of RTP/SCS investments to maintenance and operation of the system, and this region's primary focus on local road repair and rehabilitation for various state and federal funding opportunities.
9. Improve resilience and the reliability of the transportation system and reduce or mitigate stormwater impacts of surface transportation: This Planning Factor correlates or overlaps with factors that emphasize the need for system maintenance. Several work elements within the OWP will advance the reliability of the transportation system through planning research and project development to understand corridors and project needs, thereby, making fully informed decisions on investments in project improvements. Sound transportation planning, with inclusive and comprehensive outreach, are OWP work areas that facilitate resilience and reliability in the region's transportation infrastructure. Investment decisions that focus on innovative construction materials and

intermodal connectivity (with other transportation modes or Intelligent Transportation System networks) are planning strategies the OWP will examine to address this planning factor. Secondly, SJCOG understands this factor is to encourage MPOs to plan with state agencies involved in natural disasters. This planning factor also focuses on minimizing and managing impacts to the environment through practices that assess adverse storm water impacts created by construction of transportation projects. The costs—both financial and environmental—from storm water runoff are real and can be significant. OWP work elements that discuss intergovernmental coordination, planning studies, feasibility studies, environmental planning, and project development will incorporate storm water impacts and issues.

10. Enhance travel and tourism: Travel and tourism are aspects that overlap with the planning factor of economic vitality. SJCOG understands this factor encourages MPOs to foster relationships with the tourism industry and to assess how regional planning plans a role in tourism. OWP work elements that examine sustainability, quality of life, goods movement, and smart growth will include elaborations on travel/tourism impacts as part of the planning analysis and study.

2025/256 Work Elements by Federal Planning Factors

Work Elements	Planning Factors									
	1	2	3	4	5	6	7	8	9	10
601.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
601.0181		✓	✓	✓	✓	✓	✓		✓	
601.0182		✓	✓	✓	✓	✓	✓	✓	✓	✓
601.0183		✓	✓	✓	✓	✓	✓	✓	✓	✓
601.019	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
601.02	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
602.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	
602.02	✓	✓	✓	✓	✓	✓	✓	✓		
603.01	✓	✓	✓	✓	✓		✓	✓	✓	
603.015	✓	✓	✓	✓	✓		✓	✓	✓	
603.018	✓	✓	✓	✓	✓		✓	✓	✓	
603.02	✓	✓	✓	✓	✓	✓	✓	✓	✓	
603.0201	✓					✓				
603.0202	✓	✓	✓	✓	✓	✓	✓		✓	✓
603.0203	✓	✓		✓		✓	✓	✓	✓	✓
603.021						✓		✓	✓	
603.03		✓			✓		✓		✓	
603.04	✓	✓	✓	✓		✓			✓	✓
701.01			✓	✓	✓	✓	✓	✓	✓	
801.01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
801.02					✓		✓			✓
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	✓			✓	✓	✓	✓	✓	✓	✓

San Joaquin Council of Governments

FISCAL YEAR 2025/2026

WORK ELEMENTS AND TASKS

## **601.01 REGIONAL TRANSPORTATION PLAN**

A. Previous Work: The current RTP was adopted in August 2022. With this third iteration of SJCOG's Sustainable Communities Strategy (SCS) element as required by SB 375, not only did SJCOG refresh assumptions, forecasts, and new planning initiatives, but also took a new planning approach in developing potential scenarios for land-use, policy, and strategy development. New elements included an enhanced environmental justice analysis, an updated health metrics report, and a new chapter on regional housing challenges and initiatives. The adoption included an accompanying programmatic Environmental Impact Report (EIR). The RTP/SCS update was informed by a variety of foundational studies. Many of these activities have been funded through a combination of SJCOG's formula based SB1 planning funds and competitive SB1 grants. These studies are included in the RTP work element as their development is driven by the RTP/SCS and they serve to implement RTP goals and strategies. Each study is also included as a separate work element. Major innovation topics completed in previous planning cycles or currently under study are:

- Resiliency of the Transportation System (Phase 1 Complete FY 19/20). Phase 2 includes guides and resources for local agencies to incorporate resiliency and climate adaptation into their own plans and programs (Begun in FY 19/20, complete in FY 20/21).
- Technology and Innovation, including a Fiber Readiness Study (Begun FY 19/20, Complete FY 20/21)
- Gentrification and Displacement (Begun FY 19/20, complete FY 20/21).
- Envision 2050 – A New Approach to Scenario Planning (Begun FY 19/20, Complete FY 22/23). This study will be updated this fiscal year as described in WE 601.0182 in preparation for the 2026 RTP/SCS update.
- Innovations in Bicycle and Pedestrian Project Development and Delivery
- The Future of Travel Demand Management Policy & Program Delivery
- Countywide Multi-Modal Connectivity Plan

While some of these studies are now several years old, their relevance to current planning efforts is important to note, as is the progression of planning efforts that are directly responsible for current project delivery related to climate adaptation, electrification efforts, and technology advances.

Major work in the 2022 RTP update included a fresh approach to building alternative future SCS scenarios to be more driven by policy and strategy alternatives and recognition of the inherent uncertainties in forecasting future conditions. A major milestone was the completion and adoption of the 2022 RTP/SCS incorporating this new and innovative approach to the long-range planning process. SJCOG will hone, refine, and improve the approach as the 2026 RTP/SCS update is completed during the upcoming fiscal year.

Simultaneous with RTP Implementation, there is continuous monitoring of planning activities consistent with advancing RTP goals, objectives, and performance. Other activities include monitoring and updating project cost estimates and project schedules to ensure compliance with RTP financial planning and air quality conformity.

In FY 2024/25 SJCOG updated its federally required Public Participation Plan (PPP). The PPP mandates clear-cut procedures for public notification, facilitating access to information, and soliciting public input throughout its planning stages, such as plan and program development.

B. Purpose: The RTP is the comprehensive transportation planning document guiding all public policy decisions for facility and service provisions in San Joaquin County. This document is updated every four years to review regional priorities, update planning assumptions, and to integrate new laws, regulations, and guidelines into the program. Each update includes a comprehensive review of policies and revenue estimates covering the life of the plan as the basis for the transportation investment fiscal constraint analysis and an accompanying programmatic EIR.

C. Tasks:

All tasks will be delivered by SJCOG staff without the help of outside consultants, unless otherwise noted.

On-going Maintenance Tasks (these tasks are on-going or as needed through June 2026).

1. As needed, examine projects to ensure consistency with RTP policies, strategies, & project information.
2. Continue to follow through on public outreach commitments in accordance with federal and state legislation and local needs, including traditionally under-represented under-served populations such as elderly, disabled, low-income, and minority (i.e., Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders.
3. Continue to implement the RTP/SCS PPP and update RTP outreach activities.
4. Regularly update SJCOG website on planning activities with regional, local, and state agencies, the general public, and other stakeholders. Such activities include public input on the regional transportation planning process, related strategies to identify regional transportation infrastructure needs, and 2022 RTP/SCS implementation plan activities.
5. Continue outreach, research, and analyses to inform the 2026 RTP/SCS update.
6. Ensure compliance with any federal guidance related to the IIJA and previous applicable legislation, the current RTP Guidelines adopted by the California Transportation Commission in 2024 and participate in any ongoing updates of these guidelines.
7. Coordinate RTP/SCS amendments with any updates of the Federal Transportation Improvement Program (FTIP) and ensure information,

- data, project detail, and funding resources are consistent and accurate.
8. Continue to monitor best practices in performance measurement for use in future RTP implementation and development cycles and implement new models or tools - as appropriate.
  9. Continue to monitor RTP/SCS performance indicators against empirical data through the Regional Progress Report.
  10. Continue discussions/interactions/meetings with fellow RTPA partners, and the SJCOG Board & committees on RTP policies and emerging planning issues.
  11. Evaluate the effectiveness of the RTP in meeting federal requirements for federal transportation Performance Measures (PM); specifically, PM 1 (highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program).

#### RTP Update Tasks

1. Develop overall RTP/SCS update schedule.
2. Deliver policy briefings and updates to SJCOG standing committees and the SJCOG Board.
3. Finalize revenue forecasting and project list development (SJCOG staff and consultants).
4. Finalize phase 1 outreach activities in conjunction with WE 601.0182.
5. Coordinate land-use and travel demand model updates with data needs for the RTP/SCS performance evaluation (SJCOG staff and consultants).
6. Develop outline and document template for 2026 RTP/SCS update.
7. Continue collaboration with CARB to finalize required technical methodology memorandum (SJCOG staff and consultants).

#### D. Products & Schedule:

All work products and deliverables will be delivered by SJCOG staff without outside consultant assistance, unless specifically noted.

#### On-Going Maintenance:

1. Federal and State regulatory compliant RTP Amendments – as needed through June 2026.
2. Regular meetings of the RTP/SCS Working Group, including agenda items, correspondence, and meeting notes. – bimonthly or other designated intervals through June 2026.
3. Attendance of meetings at state, federal, or regional level to keep abreast of RTP/SCS implementation activities of fellow MPOs/RTPAs, dissemination of meeting notes to appropriate SJCOG staff – on-going through June 2026.
4. Funding and implementation strategies for near-term significant projects identified in 2022 RTP/SCS that provide regional benefit and reflect the Congestion Management Process (CMP), technical analysis, and report – as needed through 2026.
5. Attendance at any workshops or staff training to support RTP implementation/development, provide summary and notes for appropriate

- SJCOG staff—as needed through June 2026.
6. Meetings and correspondence with fellow RTPA partners (and local partners) on RTP policies/practices and provide presentations or any responses to data and information requests—monthly through June 2026.
  7. Review of travel-demand, scenario development, travel-demand modeling, and other technical tools for future RTP/SCS development cycles; recommendation report - Jan-March 2026.
  8. As part of Type 4 and Type 5 RTP amendments, report on how project adjustments and project implementation is helping SJCOG meet established goals for PM 1, PM 2, and PM 3, analyses, and reports – as needed through June 2026.

RTP Implementation and Development:

1. RTP update schedule and milestones (July 2025, SJCOG staff and consultants).
2. Policy briefing development and delivery to SJCOG Board (as needed July 2025 – June 2026).
3. Final forecasts (July 2025, SJCOG staff and consultants)
4. Final program and project list development (July 2025 )
5. Project branding and report template (August 2025 – October 2025)
6. Final technical methodology (August 2025, SJCOG staff and consultants)
7. Complete programmatic EIR (June 2026, SJCOG staff and consultants)

E. Funding Sources:

Federal Transit Admin (5303)	\$16,361.00 - Toll Credits 1,876.61
Federal Highway Administration PL	\$878,873.00 – Toll Credits 100,806.73
Federal Highway Administration PL – Consultant	\$150,000.00 – Toll Credits 17,205.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$895,234.00	\$150,000.00

G. Staff Required: (person-months)

<u>SJCOG</u>
6.0

**601.0181 SB1 MPO Sustainable Communities Formula Grants Awarded in FY23/24 (Innovations in Bike & Pedestrian Project Delivery and The Future of Travel Demand Management Policy & Program Development)**

A. Previous Work:

During FY 2023/24, The Future of Travel Demand Management Policy & Program Development (TDM Study) had the following tasks completed:

1. Developed an RFP and completed the consultant selection process.
2. Contract Awarded to Consultant to Conduct the TDM Study.
3. Technical Memo of the Program Evaluations.
4. Conducted Focus Group Meetings and Distributed a Commuter Survey.
5. Technical Memo of Outreach and Stakeholder Engagement Activities.
6. Finalized Needs and Gap Analysis.
7. Developed Marketing Strategies.

B. Purpose: To administer the FY 23/24 SB1 Sustainable Communities Formula Grant and build a sustainable community and transportation system through two independent planning studies. The SB 1 Formula Grant is a program in which funds are distributed by formula to the Metropolitan Planning Organizations for award to eligible projects. The grant objectives are to encourage local agencies to further state and regional goals, including, and not limited to, the RTP Implementation. The two planning projects below further the policies in the SJCOG RTP/SCS and numerous of its planning processes by supporting and enhancing the use of analytical tools to shape policies and recommend strategies that will perform well under quickly evolving future conditions. The focus of the program will be assessing data needs and sharing agreements to assist local jurisdictions and SJCOG in prioritizing projects to meet emerging state emphasis areas, furthering SCS goals, and providing robust data on program effectiveness. Both studies will assist in reducing greenhouse gasses by reducing the need for single-occupancy automobile driving through innovation in transportation demand management (TDM) strategies, streamlined and informed delivery of bicycle and pedestrian infrastructure, and new modeling datasets. These programs will also further several previous state-funded (notably SB1 and continuing pilot projects originally funded under state STEP grant funds) studies toward implementation. These planning activities directly play a role in helping policymakers move toward better-informed transportation investment decisions.

1. Innovations in Bike & Pedestrian Project Delivery: SJCOG will acquire data sets and explore robust tools to aid in project prioritization protocols, evaluate existing program effectiveness, and provide a path to streamlined bike and pedestrian project delivery. The study and new datasets will pull together several previous and on-going efforts to develop a blueprint for project development against multiple types of future funding opportunities. Previous studies include Active Transportation Projects in Priority Neighborhoods, STEP grant bike-share program project siting and implementation, Bike Tourism Study, and data from the proposed REAP 2.0 Mobility Hubs project. These identified objectives will meet several SB1 study priorities, including first/mile project development, provide information on mode shift potential for disadvantaged communities, aid in improving access to community destinations,

evaluation of connectivity in the multi-modal transportation network, and increasing effectiveness for project development and funding.

2. The Future of Travel Demand Management Policy & Program Development. SJCOG proposes to build on and revamp its successful dubs travel demand management program. This study will provide a survey of best practices and new innovations in travel demand management techniques, and include agency, partner and stakeholder outreach and participation. The study will also identify resources for the electrification of vehicles used in the program for the region. The final project study report will turn initial deliverables into a strategic plan for a renewed program launch.

These identified objectives will meet several SB1 study priorities, including first/mile project development, provide information on mode shift potential to carpool and vanpool, aid in improving access to community and neighborhood transportation hubs, evaluation of connectivity in the multi-modal transportation network, and increasing effectiveness for travel demand management efforts countywide – decreasing VMT and greenhouse gas emissions.

C. Tasks: Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant – some tasks will roll-over to future OWPs):

#### 1. Innovations in Bike & Pedestrian Project Delivery:

##### Task 1: Project Administration:

Task 1.1: Management and oversight of project and deliverables, as well as project kick-off, invoicing and budget tracking, and progress reporting to Caltrans.

Task 1.2: Staff will coordinate bi-weekly check-in meetings to go over program progress.

Task 1.3: Consultant and data procurement process – select consultant(s), consultant team, or vendor using proper procurement procedures.

##### Task 2: Review existing studies and best practices in project delivery and funding programs.

Task 2.1. Review of existing studies from SJCOG's previous efforts.

Task 2.2: Review of current partner agency planning documents.

Task 2.3: Best practices and applicant resources from current and near-term funding programs – divided into project type and purpose.

Task 2.4: Technical memorandum of findings for project development.

##### Task 3: Data Acquisition

Task 3.1: Review of available funding mechanisms and project selection criteria for recommended tools and data sets to best position projects for selection and funding.

Task 3.2: Review of SJCOG travel demand model to determine bicycle and pedestrian network and analysis capability. Provide recommendations for the incorporation of new non-motorized network updates or off-model calculations for quantification of project benefits.

Task 3.3: Determine the need for cooperative agreements for joint data and tool acquisition or development to fit future grant opportunities at the federal or state level.

Task 3.4: Technical memorandum of findings for data acquisition and tool development.

#### Task 4: Project Templates

Task 4.1: Based on tasks 2 & 3, develop categorical project types based on primary users, regional location, infill/gap closure status, and regional connectivity.

Task 4.2: Provide templates for required application data and analysis packages.

Task 4.3: Provide templates for application narrative by project type and funding source.

Task 4.4: On-call technical assistance for applicants in developing projects to meet funding requirements.

#### Task 5: Draft and Final project report.

### 2. The Future of Travel Demand Management Policy & Program Development:

A substantial portion of the TDM study was completed in FY 2024/25. Building on the deliverables from previous tasks, the final reports will be developed to include a comprehensive set of recommendations for enhancing the SJCOG TDM program, dibs.

#### Task 6: Develop performance measures and tools to evaluate TDM strategies.

#### Task 7: Draft Regional TDM Strategies and Implementation Plan.

Task 7.1: Create a draft outline

Task 7.2: Develop a draft Report

Task 7.3: Present the Draft Report to the Board

Task 7.4: Final Adopted Report

### D. Products & Schedule:

#### 1. Innovations in Bike & Pedestrian Project Delivery:

- Project kick-off meeting/meeting notes (complete)
- Procurement process and execute consultant contract – (complete)
- On-going staff and consultant coordination meetings/meeting notes- (July 2025 – June 2026)
- Technical memorandum for project delivery and funding (November 2025)
- Technical report of recommended tools and data sets by project type and funding

- category– (December 2025)
- Project development and application templates (February 2026)
- Technical Assistance Performance Period (July 2025/will carry-over to subsequent FY)
- Draft and final project report (will carry-over to subsequent FY)

2. The Future of Travel Demand Management Policy & Program Development:

- Data Set and Tools for Program Performance Measures
- Outline, Draft, and Final project report for (July 2025).

E. Funding Sources:

Senate Bill 1 FY 23/24 carryover: \$233,611.00

Local Transportation Fund: \$30,266.78

F. Responsible Agency:

<u>SJCOG:</u>	<u>Consultant:</u>
\$63,877.78	\$200,000.00

G. Staff Required: (person months)

SJCOG:

2

**601.0182 SB1 MPO Sustainable Communities Formula Grants Awarded in FY24/25 (Envision 2050 Revisited: SCS Scenario Development, Public Engagement & Technical Evaluation)**

A. Previous Work: The 2022 RTP/SCS update introduced a fresh, policy-driven approach to scenario planning, focusing on strategy alternatives and acknowledging the uncertainties of forecasting future conditions. The 2026 RTP/SCS update, will refine and improve this approach, ensuring a more adaptive and effective framework for guiding future growth and investment in the region.

In FY 2024/25, SJCOG successfully completed the RFP process for selecting a consultant to support the development of the 2026 SCS. The project officially launched with a kickoff meeting in January 2025, marking the completion of its initial phases. Key accomplishments for the 2026 update include:

Task 1: Project Administration

Task 1.4. Project kick off

Task 2: Review SCS Pillars, Assumptions, and Strategies.

Overview: The outcomes of this task will be three-fold:

- To confirm the foundational “pillars” or foundational elements on which the RTP/SCS scenarios will be developed. Six SCS foundational elements were identified in the development of Envision 2050, the scenario development process for the 2022 RTP/SCS: Technology & AV Adoption, Climate Impacts, Housing Production, In & Out Commuting, Jobs & Economy, Vibrant Neighborhoods.
- For each pillar or elements within a pillar, identify the key factors or challenges to be addressed by potential strategies.
- Develop menu of future strategies that will be tested in one or all of three potential futures; those strategies and their potential to address the identified challenges will be moved forward for prioritization in the stakeholder and civic engagement processes.

Task 2.1. Develop Action Plan

- Consultant to review recent topical SB1 planning studies, early community engagement results, SJCOG staff policy briefings and discussion, and other studies identified.
- SJCOG staff and consultant to identify topic area studies and data for review and identify participants/interviewees for focus groups or expert panels.
- Consultant to develop meeting schedule, interview questions, agendas for SJCOG staff review.
- Consultant will summarize findings and results in a technical memorandum for SJCOG staff and RTP/SCS advisory committee review, then develop draft and final project action plan.

Task 2.2: Conduct/facilitate expert focus groups, interviews and meetings with subject matter experts as identified in task 2.1.

Cascadia proposes to conduct up to six (6) 90-minute subject-matter expert focus groups organized by SCS Pillar (i.e. one interview per SCS Pillar). The purpose of these focus groups will be to help the team better understand the potential “critical uncertainties” facing the region and identify data sources or research that could further expand our understanding. We will use what we learn to develop a set of 4-5 draft futures, constructed from various exogenous outcomes (i.e. high EV adoption, low transit funding future). The SCS Working Group will help us refine these futures from five down to the final three in a later phase of the project.

In addition, we will use these expert interviews to review 2022 SCS strategies and identify potential new durable strategies that could be employed by SJCOG or its jurisdictional partners to affect positive change as the region grows. This approach is an improvement to the 2022 process, which we feel relied too heavily on the expertise of the SCS Working Group. We feel that reaching out directly to subject matter experts will result in a more technically sound approach.

#### Task 2.3: SJCOG Project List Review

One area for improvement upon the 2022 SCS process is a clearer linkage between transportation projects and regional strategies. Cascadia Partners and Fehr & Peers propose to work with SJCOG transportation planners to review the 2022 project list to more explicitly link project types to high level strategies (i.e. Managed Lanes / ITS, Road Diets, etc.). Cascadia Partners will meet with SJCOG staff for a 90-minute work session. The result of this task will be a concise memorandum outlining how the range of projects in the last RTP relate to and support proposed regional strategies.

#### Task 2.4: SCS Working Group Meeting #1 - Action Plan

Cascadia Partners will facilitate a 90-minute meeting with the SCS Working Group to present the draft Action Plan and initial findings from expert interviews.

#### Task 2.5: Summaries and Technical Memorandum of Findings

Based on the feedback received from the expert interviews, Cascadia Partners will develop a concise technical memorandum summarizing potential critical uncertainties, a range of 4-5 potential draft futures, and a proposed list of up to 30 high level regional strategies. We intend to bring this information to the SCS Working Group in subsequent phases of the project to confirm our assumptions match local lived experience and to help arrive at the final three futures called for in Task 4.

#### Task 3: Develop Tools and Models

Overview: This task will result in technical models to evaluate the quantitative and qualitative impacts of identified strategies. Once final pillars or foundational elements are identified, predictive models will be used to identify potential opportunities and challenges under each pillar for three future conditions. High performing strategies will be advanced for public and stakeholder prioritization. Once priority strategies are established, land use allocation and/or sketch planning tools are to be utilized to turn data and forecasts into

land-use development patterns by Traffic Analysis Zones (TAZs). Land-use allocations will consist of population, households, housing units, and jobs by TAZ. The end result of the process will be in a format readily readable by SJCOG's four-step travel demand model. SJCOG currently utilizes Envision Tomorrow for land-use allocation, REMI to aid population and jobs forecasting and policy-testing, MetroQuest for public outreach, and an enhanced four-step travel demand model (Cube-based) for technical evaluation and performance metrics in its RTP/SCS work. These models can be utilized by the consultant team of consultant team may suggest other models with which they have developed expertise. Proposals should clearly state models being proposed, as well as include costs to acquire access to modeling platform and data, on-going maintenance costs, and training for SJCOG staff.

Task 3.1: Define Tools and Models: The consultant team will prepare a background research presentation and meet with the PMT for a 90-minute work session to discuss available tools and data and to discuss potential additional tools that the team can apply.

Task 3.2: Model Testing and Validation or Calibration: Any land-use allocation, economic, or other models to be used to analyze future assumptions, strategies, or comparative plan metrics will be validated/calibrated or otherwise tested as appropriate on the just previous RTP/SCS adopted in 2022.

Task 3.3: Technical reporting: Once all models have been adequately calibrated and tested, the consultant team will document the approach and testing results in a concise land use strategy modeling memorandum. This memorandum will summarize the overall approach of testing and scoring strategies, how these strategies are proposed to inform land use allocations, and how the preferred land use allocation will be summarized in a sufficiently detailed way so as to convey how strategies will be implemented to achieve the stated outcomes. In short, this memorandum should provide much of the information needed for SJCOG to complete the Technical Memorandum it must submit to CARB per Government Code Section 65080(b)(2)(J)(i).

- B. Purpose: To administer the FY 24/25 SB1 Sustainable Communities Formula Grant and build a robust scenario development and public engagement process as the foundation for SJCOG's 2026 Sustainable Communities Strategy. The SB1 Formula Grant is a program in which funds are distributed by formula to the Metropolitan Planning Organizations for award to eligible projects. The grant objectives are to encourage local agencies to further state and regional goals, including, and not limited to, RTP Implementation. The project will develop, evaluate the potential impacts of, and compare performance metrics for, a set of policy and investment strategies to help the SJCOG region to achieve the transportation goals and priorities of the region. It will be designed to support and enhance the use of analytical tools to shape policies and recommend strategies that will perform well under quickly evolving future conditions.
- C. Tasks: Staff will continue to work with the consultant to complete the SCS report for the 2026 RTP update.
  - A. Tasks - All tasks will be delivered by SJCOG staff and contracted consultants:

Task 1: Project Administration:

Task 1.1: Project oversight of deliverables, as well as, invoicing and budget tracking, and progress reporting to Caltrans.

Task 1.2: Staff will coordinate bi-weekly check-in meetings to go over program progress.

Task 1.3: Finalizing scope, budget, and schedule

#### Task 4: Future Development & Strategy Testing

Cascadia Partners proposes to test up to 30 high-level strategies, tied to the 6 pillars, across up to three exogenous futures. As mentioned in the previous task, we will use sketch models and academic research to assign percentage impacts to strategies which will modify the baseline results of a set of metrics in each exogenous future. The end result will be a database of strategies with 1-5 or low-high scores assigned for each metric in each future. In this task, we will work closely with the SCS Working Group to vet futures and strategies. This information will then be used in subsequent tasks to communicate strategy impacts to the public and stakeholders.

##### Task 4.1: SCS Working Group Meeting #2 - Three Futures

Based on the 4-5 draft futures developed in task 2, Cascadia Partners will use feedback from the SCS Working Group to arrive at the final 3 futures. Cascadia Partners will facilitate a 90-minute work session with the SCS Working Group to explore the 4-5 draft futures and arrive at the three that are deemed most plausible.

##### Task 4.2: Draft Metrics and Strategy Point Values

Our team will use the version of TrendLab+ calibrated in the previous task and establish baseline values across up to four (4) evaluation metrics which could include cost, VMT, GHG, transit ridership, and housing cost or production. We will then run each strategy through TrendLab+ and record the incremental impacts of each strategy on each metric in each future in terms of a 1-to-5-point value. Results from this analysis will be summarized in a presentation and database.

##### Task 4.3: Futures Framework Memorandum

The consultant team will produce a futures framework memorandum that documents the futures selected by the SCS Working Group, the methods and results of scoring the 30 regional strategies across those three futures.

#### Task 5: Public Outreach/Strategy Prioritization.

Overview: Task 5 is composed of two rounds of outreach to address two critical project milestones: the prioritization of regional strategies and the selection of a preferred scenario. Prioritization of strategies is proposed to involve the SCS Working Group, jurisdictional partners, and focus groups, while scenario selection is proposed to involve the general public.

Task 5.1: To prioritize and group regional strategies, Cascadia Partners proposes to engage the SCS Working Group (Meeting #3), jurisdictional partners (up to 1 meeting), and up to three (3) community focus groups in an engaging game-like exercise. Cascadia

Partners recently developed a strategy-focused card game in partnership with the Lincoln Institute of Land Policy. The game challenges participants to assume various personas (housing advocates, renters, conservationists, etc) while evaluating scored strategies. As a group, summarize results as lists of strategies ranked both within individual futures and in the aggregate.

**Task 5.2: General Public Outreach:** Once draft alternative scenarios are complete, Cascadia Partners and AIM Consulting will host up to three (3) in-person pop-up scenario choosing workshops in various locations across San Joaquin County as well as one stand-alone workshop that will be advertised and located at a single venue within the County. These workshops will include interactive exercises, and we will work to develop scenario “report cards” that replicate some of the same performance metrics required by CARB to demonstrate SCS attainment of GHG targets. In addition to these report cards, Cascadia will develop up to two (2) spatial illustrations of scenarios at various scales to communicate the changes and trade-offs associated with each. The result will be input on each alternative scenario and its associated strategies to help the team arrive at a hybrid preferred land use allocation. In addition to in-person workshops, the team will design a virtual scenario choosing exercise using MetroQuest, ESRI StoryMaps, Typeform Survey or a similar online engagement platform.

**Task 5.3: Engagement Summary Memorandum:** Cascadia Partners will produce a concise engagement summary memorandum. This memorandum will document the engagement events, attendees, outreach methods, and results of each round of stakeholder and general public engagement in this task. Finally, the document will provide recommendations for how to use general public feedback from the workshops and online exercise to create a hybrid preferred land use allocation.

## **Task 6: Develop Land-Use & Transportation Model Scenario Inputs**

**Overview:** In task 6, our team will transition from strategies to spatial land use allocation scenarios. To do this, we will develop scenario narratives consisting of various strategies and associated allocation criteria, vet those criteria with jurisdictions, produce alternative scenarios, and arrive at a preferred scenario with associated transportation projects.

**Task 6.1. Allocation Criteria Development:** Based on feedback received from the stakeholder-based outreach in task 5.1, Cascadia Partners will develop a series of strategy-based scenario narratives. These narratives will represent different approaches to accommodating growth dictated by the implementation of varying regional strategies to varying degrees. Once narratives are constructed, our team will make recommendations for quantitative and spatial allocation criteria. Special attention will be paid to ensure that these criteria meet the 2024 CARB SCS Evaluation Guidelines including the need for fine grain geographic reporting.

**Task 6.2. Jurisdictional Consultations:** Using the allocation criteria established in task 6.1, Cascadia Partners will develop a briefing packet for each jurisdiction in the region that documents assumptions and data sources and gives jurisdictional partners a chance to provide feedback on local development proposals and other factors that should be considered in land use allocations. Cascadia Partners staff

will facilitate up to six (6) 45-minute briefings with jurisdictional staff. We propose separate meetings for San Joaquin County (unincorporated), Stockton, Lodi, Tracy, and Ripon with a combined meeting for French Camp, Manteca, and Lathrop.

Task 6.3. Land-Use Allocation Modeling: Cascadia Partners will develop up to three (3) alternative land use allocation scenarios using the version of Envision Tomorrow calibrated in Task 3. Development types and allocation strategies will clearly respond to the regional strategies associated with each scenario. All scenario results will be quantified based on the required CARB reporting metrics and organized into a scenario “report card”. Cascadia Partners will rely on SJCOG TDM staff and/or consultants to run land use allocations through the travel demand model to obtain VMT and GHG quantification results. This data will be presented to the public alongside visualizations in the public workshops described in Task 5.2. Allocation data will be provided, by out year, to SJCOG TDM staff and/or consultants in TAZ-based format that is compatible with the travel demand model.

Task 6.4. Preferred Scenario, Strategy, and Project/Program Lists: Based on feedback received during public workshops and the virtual scenario choosing exercise, Cascadia Partners will develop a hybrid preferred land use allocation. We will produce parcel-level allocations for the base year, SB 375 scenario years, and the RTP out-year. Additional years will be interpolated from these point-in-time allocations using a spreadsheet-based allocation model developed by Cascadia Partners for the 2022 RTP/SCS. Cascadia Partners will conduct a 90-minute work session with SJCOG transportation staff to identify transportation projects and a final list of strategies to accompany the preferred land use allocation. Final allocations will be provided to SJCOG TDM staff and/or consultants in a TAZ-based format that is compatible with the travel demand model.

Task 6.5. SCS Working Group Meetings for Scenario Development: Throughout the work in Task 6, Cascadia Partners and AIM Consulting will facilitate one-hour SCS Working Group meetings to keep stakeholders updated on scenario development progress and solicit feedback on draft technical deliverables. We propose three meetings during the scenario development phase of the project (meetings #4, #5, and #6). These meetings will focus on reviewing and confirming allocation criteria, reviewing draft results of alternative scenarios, and confirming the preferred scenario.

Task 7: Final Plan Metric Development.

Overview: Consultant will assist SJCOG staff in producing final metrics to carry forward into the RTP/SCS scenario development process, as well as a current trends scenario and appropriate alternatives for the accompanying EIR. The consultant will work with SJCOG staff and the chosen EIR consultant in formulating appropriate alternative scenarios to satisfy CEQA required alternatives.

Task 7.1. Review of Existing Plan & EIR Metrics: Cascadia Partners will review the EIR metrics that we produced for SJCOG as part of the 2022 SCS. We will cross-reference these metrics with the 2019 Final Sustainable Communities Strategy Program and Evaluation Guidelines as well as the recent 2024 amendments to those guidelines. We will produce a reporting framework that can be easily updated with new land use

allocation data as metric testing conducted in subsequent tasks may necessitate adjustments to the preferred land use allocation.

Task 7.2. Metric Testing. Cascadia Partners will work with SJCOG TDM staff and/or consultants to iteratively run versions of the preferred land use scenario through the SJCOG enhanced TDM in order to achieve CARB VMT and GHG reduction targets.

#### Task 7.3: Scenario Development Report

Based on the memoranda produced in tasks 3, 4, and 5, as well as the results of the land use allocation process in task 6, Cascadia Partners will produce a concise scenario development report in Microsoft word format using SJCOG's preferred template. This report is intended to provide a full overview of the methods, assumptions, and results of the SCS process. It is intended that this document will exist as an appendix to the RTP/SCS.

#### D. Products & Schedule:

This is a multi-year grant. Project kicked off in 2024/25 and will be completed this fiscal year.

##### Task 1:

- Project oversight (through June 2026)
- Bi-weekly PMT Meetings (through June 2026)
- Monitor and amend scope and timeline, as needed (June 2026)

##### Task 4:

- SCS Working Group Meetings (April – August 2025)
- Draft metrics and strategy point values (April-July 2025)
- Futures framework memorandum (May-July 2025)

##### Task 5:

- Stakeholder and focus group approach and plan, including recommended collateral, table games, exercises – and schedule (May-July 2025)
- General public engagement plan (October 2025)
- Engagement Summary Memorandum (December 2025)

##### Task 6:

- Allocation criteria development (June-July 2025)
- Jurisdictional consultations (July 2025)
- Land use allocation modeling (July 2025)
- Preferred scenario, strategy, and project/program lists (Oct-Nov 2025)
- SCS Working Group meetings for scenario development (July-Nov 2025)

##### Task 7:

- Review of existing plan and EIR metrics (Dec 2025-Jan 2026)
- Metric testing (December 2025-April 2026)
- Scenario Development Report (May-June 2026)

E. Funding Sources:

Senate Bill 1 FY 24/25 Carryover:	\$300,411.00
Local Transportation Fund:	\$38,921.43

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$214,332.43	\$125,000.00

G. Staff Required: (person months)

SJCOG:

2.0

**601.0183 SB1 MPO Sustainable Communities Formula Grants Awarded in FY23/24 (Transit-Oriented Development (TOD) Framework Update: Building on the 2012 Smart Growth Improvement Program)**

A. Previous Work: This is a new grant activity for FY 24/25.

B. Purpose: To administer the FY 2024/25 SB 1 Sustainable Communities Formula Grant, SJCOG will conduct an independent planning study to build on and enhance the 2012 Smart Growth Improvement Program. This effort will prioritize smart growth and transit-oriented development (TOD) while aligning with the grant's objectives. The SB 1 Formula Grant provides funding to Metropolitan Planning Organizations for projects that advance state and regional goals, including TOD initiatives. The project will update the TOD Framework by adopting a process inspired by the 2012 study, integrating stakeholder engagement, and addressing updated goals and priorities.

Key focus areas for this updated study include promoting infill development to efficiently utilize existing resources, achieving equitable and fair housing goals by addressing anti-displacement measures and housing preservation, and integrating with the Housing Fund to strategically build affordable housing and recommend funding mechanisms.

Additionally, collaboration with local stakeholders will ensure that TOD strategies address underserved areas and support economic development in growing communities, while integration with the Regional Mobility Hub Plan will enhance transit access, reduce travel times, and connect housing developments with mobility hubs, especially for underserved populations.

The updated TOD plan will help SJCOG promote smart growth development through the Smart Growth Incentive Program (SGIP) and strengthen collaboration with member agencies to integrate the County's Sustainable Communities Strategy (SCS) into SJCOG's Regional Transportation Plan (RTP). The plan aligns with key SB 1 grant program objectives, including:

- **Social Equity and Sustainability**: Prioritizing housing near transit and leveraging the San Joaquin Regional Housing Fund to support affordable housing development, advancing transit-oriented development to reduce greenhouse gas emissions, and supporting infill development.
- **Accessibility**: Drawing on the 2012 study and incorporating the Regional Mobility Hub Plan to enhance mobility through infrastructure improvements such as street calming, walkable community designs, transit amenities, and alternative transportation modes to ensure equitable access.
- **Public Health**: Reducing pollution and improving transit access to encourage active transportation and healthier communities.
- **Economy**: Integrating housing, transit, and job opportunities, with a focus on using the Housing Fund to facilitate affordable housing near transit and employment centers, thereby supporting economic growth and strengthening regional vitality.
- **Innovation**: Using technology to enhance mobility hubs and improve transit system performance.

These efforts ensure the updated TOD plan builds on the 2012 Smart Growth Improvement Program while meeting SB 1 Sustainable Communities Formula Grant objectives to advance sustainability, public health, accessibility, and economic vitality across the region.

C. Tasks: Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant – some tasks will roll-over to future OWPs). All tasks, except project administration, will be completed by SJCOG and contracted consultants:

1. Project Administration:

Task 1: Project Administration:

Task 1.1: Management and oversight of the project, including deliverables, invoicing, budget tracking, and progress reporting to Caltrans.

Task 1.2: Conduct project kick-off meeting and prepare meeting notes.

Task 1.3: Bi-weekly check-in meetings with staff and consultants to track progress

Task 1.4: Consultant procurement using proper procurement procedures, including selecting consultant(s) or vendor(s).

Task 2: Review existing studies and frameworks:

Task 2.1. Review of existing studies from SJCOG's previous efforts (2012 Smart Growth Improvement Program).

Task 2.2: Review of current partner agency planning documents.

Task 2.3: Best practices and applicant resources from current and near-term funding programs – divided into project type and purpose.

Task 2.4: Technical memorandum of findings for project development.

Task 3: Stakeholder Engagement

Task 3.1: Develop a stakeholder engagement plan, including community groups, local agencies, and underserved populations.

Task 3.2: Conduct outreach through surveys, focus groups, workshops, or public meetings to gather input on TOD strategies.

Task 3.3: Summarize engagement findings in a memorandum to guide plan development.

Task 4: Data Acquisition and Analysis

Task 4.1: Identify and review relevant data sources to inform transit, housing, and mobility planning.

4.2. Evaluate existing funding mechanisms and opportunities to support affordable housing and TOD initiatives.

4.3. Assess current tools and models to determine their effectiveness and identify potential updates or enhancements.

4.4. Summarize findings and recommendations to guide the updated TOD plan.

Task 5: Framework and Plan Development

Task 5.1: Develop the updated TOD framework, incorporating data analysis, stakeholder feedback, and 2012 program insights.

Task 5.2: Create templates and strategies to address key focus areas, including housing near transit, infill development, and mobility integration.

5.3. Prepare a draft TOD plan for review and feedback from stakeholders and the public.

5.4. Finalize the TOD plan, incorporating revisions to align with SB 1 grant objectives and regional priorities

Task 6: Draft and Final project report

Task 6.1: Create a draft outline Task

Task 6.2: Develop a draft Report Task

Task 6.3: Present the Draft Report to the Board Task

Task 6.4: Final Adopted Report

D. Products & Schedule:

- Project kick-off meeting/meeting notes- (July 2025)
- Procurement process and execute consultant contract – (August – December 2025)
- On-going staff and consultant coordination meetings/meeting notes – (December 2025 – June 2026, will carry over to subsequent FYs)
- Technical memorandum of program review and recommendation of best practices/innovation – (March – June 2026)
- Recommendations (task will be completed in subsequent fiscal years)
- Report on findings (task will be completed in subsequent fiscal years)
- Draft and Final project report (task will be completed in subsequent fiscal years)

E. Funding Sources:

Senate Bill 1 FY 24/25	\$353,501.00
Local Transportation Fund	\$45,799.80

F. Responsible Agency:

<u>SJCOG:</u>	<u>Consultant:</u>
\$124,300.80	\$275,000.00

G. Staff Required: (person months)

SJCOG: 2

## **601.019 REGIONAL TRANSPORTATION PLAN IMPLEMENTATION**

- A. Previous Work: Implementation of the Regional Transportation Plan includes actions taken to ensure the policy and program commitments in the RTP come to fruition. For the 2018 and 2022 RTP/SCS, this work included a series of emerging policy briefings designed to “future”-proof the long-range plan by identifying barriers to implementation, disruptive technologies, or new trends in housing and climate resiliency planning. A similar strategy will be employed for the 2026 RTP/SCS, with adoption expected in June 2026.
- B. Purpose: The work element may be used to identify pilot programs, academic research, new grant opportunities, or fund staff time related to developing or implementing identified programs and grants. Tasks and deliverables in this work element will be delivered in conjunction with 602.02 (Regional Transportation Plan Studies).
- C. Tasks:

### General RTP/SCS Implementation:

All tasks will be completed by SJCOG staff without outside consultant assistance unless otherwise noted.

1. Continue work on strategic funding planning for on-going implementation initiatives, to include future long-term revenue projects, probable new funding sources, and grant application planning. (July 2025 – June 2026). This task will be completed with the help of an outside consultant.
2. Develop project prioritization strategy (qualitative or quantitative) to ensure consistency with federal and state legislative priorities and funding (July 2025 – June 2026).
3. Continue developing policy papers and briefings for standing committees and the SJCOG policy board (July 2025 – June 2026).

### D. Products & Schedule:

#### General RTP/SCS Implementation:

All products will be completed by SJCOG staff without assistance from outside consultants unless otherwise noted.

1. Updated RTP initiative strategic funding planning (July 2025-June 2026)
2. Continued grant writing activities (July 2025-June 2026, delivered with SJCOG staff and potential consultant assistance)
3. Identification of policy papers and research studies (on-going July 2025 – June 2026)
4. Operational products/deliverables completed on a monthly or quarterly basis, to include meeting agendas, meeting notes, sub-grantee coordination, technical and fiscal coordination/review, progress reporting, presentations, and event/meeting participation (On-going July 2024-June 2025) – SJCOG staff and consultant.
- 5.

E. Funding Source:

Federal Highway Administration PL	\$25,000.00 – Toll Credits 2,867.50
Federal Transit Admin (5303)	\$285,217.00 - Toll Credits 32,714.39
Federal Transit Admin (5303) carryover	\$25,181.55 - Toll Credits 2,888.32

F. Responsible Agency:

SJCOG  
\$335,398.55

G. Staff Required: (person-months)

SJCOG  
8.0

## **601.02 REGIONAL TRANSPORTATION PLAN STUDIES**

- A. Previous Work: Over the last several years, numerous transportation planning studies have been conducted which materially contributed to the formulation of various Regional Transportation Plan elements. This has included corridor studies, access improvement studies, roadway and highway operational improvement planning, new alignment studies, corridor project sequencing, and financial plans. These studies and analyses are conducted using Federal and state planning provisions. These studies are an essential part of SJCOG's work as an RTPA and MPO. These studies include significant involvement from other agencies and significant public involvement. Once funded, studies are moved to their own work elements for implementation if necessary (depending on funding utilized).

Recent studies either started or fully completed under this work element include:

- Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan
- Lodi Multimodal Transportation Network and Land Use Compatibility Action Plan
- Flood Adaptation Strategy for State Route 4 through San Joaquin Delta River
- Lodi Greenline Feasibility Study
- Tuolumne County led Regional Bike Tourism Study
- Regional Truck Planning Study
- Roth Road STAA Truck Route Study

- B. Purpose: These studies are to identify workable solutions to San Joaquin County's mobility problems. These solutions are to be included in the Regional Transportation Plan as funding allows or to develop future projects or planning programs to seek future funding.

C. Tasks:

All tasks will be completed by SJCOG staff without outside consultant assistance.

1. Foster continued partnerships with local and state agencies to assess and identify regional transportation planning studies for development.
2. Collaborate with partners on any policies, strategies, or programs related to the Highway 99 Business Plan. This includes analysis of regional transportation planning issues that enhance the movement of people on the regional, interregional, and statewide Highway 99 system and any issues affecting access to major freight routes, intermodal transportation, and airports.
3. Initiate and explore unfunded transportation needs on regional corridors and conduct conceptual feasibility analysis, as needed.
4. Participate with San Joaquin Valley partners in additional planning efforts related to the Highway 99 Business Plan.
5. Participate in local agency or Caltrans-led project study reports for regionally

significant efforts.

6. Prepare staff reports, topical reports, or issues papers related to regional transportation infrastructure and their planning/programming challenges, including the identification of planning areas or specific corridors requiring further study.
7. Monitor planning studies and ensure these efforts are consistent with the regional congestion management process. Participate in development of planning studies to jump-start regional roadway project delivery as needed.
8. Foster continued partnership with Alameda County Transportation Commission (ACTC) and Bay Area partners on studies or technical analyses related to I-205 Corridor.
9. Prepare technical report(s) or study (ies) on regional corridors.

D. Products & Schedule:

All products will be completed by SJCOG staff without assistance from outside consultants unless otherwise noted.

1. Meetings on efforts on Highway 99 Business Plan – Operational activities with deliverables reported on a quarterly basis through June 2026.
2. Correspondence on planning study activities on key CMP Corridors to ensure CMP consistency– As needed through June 2026.
3. Technical reports and issues papers related to regional transportation infrastructure – Operational activities with deliverables reported on a quarterly basis through June 2026.
4. Meetings and correspondence related to furthering the Highway 99 Business Plan – Operational activities with deliverables reported on a quarterly basis.
5. Meetings with Caltrans (lead) on I-5, I-205, Hwy-120, and SR-99 Corridor Management Plans including, correspondence, document review, and technical assistance– Operational activities with deliverables reported on a quarterly basis through June 2026.
6. Written recommendations on identifying any projects requiring further planning study – Operational activities with deliverables reported on a quarterly basis through June 2026.

E. Funding Source:

Federal Highway Administration (FTA 5303)	\$175,000.00 – Toll Credits 20,072.50
Local Transportation Authority MK - COG	\$72,069.00

F. Responsible Agency:

SJCOG  
\$247,069.00

G. Staff Required: (person-months)

SJCOG  
8.0

## **602.01 TRANSPORTATION IMPROVEMENT PROGRAMS**

- A. Previous Work: Adopted a 2025 FTIP update and processed numerous amendments. Adopted the 2024 Regional Transportation Improvement Program (RTIP) to reflect the State Transportation Improvement Program (STIP) funding for San Joaquin County.
- B. Purpose: The Federal Transportation Improvement Program is the programming document that carries out the federal mandates of IIJA, complies with the requirements of the Clean Air Act Amendments, and implements the priorities of SJCOG's Regional Transportation Plan. The Federal Transportation Improvement Program provides a snapshot of all near-term, regional significant transportation projects with funding sources available or committed in San Joaquin County. In contrast, the Regional Transportation Improvement Program is a vehicle for requesting funds for new projects through the State Transportation Improvement Program administered by the California Transportation Commission. The Transportation Improvement Program project requests are drawn from the Regional Transportation Plan and Congestion Management Program process requirements.

C. Tasks:

All tasks will be completed by SJCOG staff without the assistance of outside consultants.

1. Manage and monitor STIP/RTIP.
2. Manage and monitor FTIP, including preparing FTIP amendments.
3. CTIPS database maintenance for FTIP and STIP projects.
4. Develop a tracking process that ensures RTIP projects seeking an allocation of funds, known as an "allocation vote" from the California Transportation Commission are in compliance with the FTIP-approved programming.
5. Assist local agencies to prepare RTIP amendments and fund vote requests (i.e., allocation votes from California Transportation Commission), as well as technical assistance related to all federal funding programs under the FAST Act.
6. Monitor obligational authority and federal regulatory compliance (scope eligibility, funding (local match) ratios, and financial constraint requirements) for CMAQ Program of Projects.
7. Monitor obligational authority and federal regulatory compliance (scope eligibility, funding (local match) ratios, and financial constraint requirements) for STBG Program of Projects.
8. Facilitate and participate in discussions on federal programming topics with public, SJCOG Committees, regional/state/federal programming working groups, and other stakeholders related to federal project screening, federal funding regulations, and procedural requirements.
9. Facilitate the programming/implementation of STBG Program of Projects.
10. Facilitate the programming/implementation of CMAQ Program of Projects.
11. Facilitate the programming/implementation of Carbon Reduction Program (CRP) Program of Projects, which also includes obtaining Caltrans' certification of projects' eligibility and alignment with the State's Carbon

Reduction Strategy.

12. Evaluate the effectiveness of the FTIP in meeting federal requirements for federal transportation Performance Measures (PM); specifically, PM 1 (highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program), and Greenhouse Gas (GHG) reduction.

D. Products & Schedule:

All work products will be delivered by SJCOG staff with the assistance of outside consultants.

1. Oversight of State Transportation Improvement Program of Projects – As required with California Transportation Commission approved STIP Guidelines – monthly through June 2026.
2. Documentation of Amendments to Federal Transportation Improvement Program – As required by project implementation – monthly through June 2026.
3. Participate in CTIPs and any statewide discussion on TIP programming– Operational activities with deliverables reported on a quarterly basis through June 2026.
4. Technical memoranda or correspondence related to federal funding apportionments and obligations of CMAQ Program to ensure consistency with FTIP Program of Projects and Financial Plan– quarterly through June 2026.
5. Written technical reports or memoranda which monitor federal funding apportionments and obligations in STBG Program to ensure consistency with FTIP Program of Projects and Financial Plan– monthly through June 2026.
6. Monitor the federal funding apportionments of the region’s CRP and tracking the obligations to programmed projects.
7. Agendized meetings of federal programming activities with various committees and working groups– monthly through June 2026.
8. Documented updates to STBG Lump Sum List and ensure accurate listing and adherence to federal programming requirements—Monthly through June 2026.
9. As part of the FTIP, report on how project adjustments and project implementation are helping SJCOG meet established goals for PM 1, PM 2, and PM 3 – as needed through June 2026.

E. Funding Source:  
Federal Highway Administration (PL Carryover) \$17,406.08 Toll Credits 1,996.48  
STIP PPM FY25/26 Final Allocation \$290,000.00  
Local Transportation Authority - COG \$147,661.00

F. Responsible Agency:

SJCOG  
\$455,067.08

G. Staff Required: (person-months)

SJCOG  
18.0

**602.02 ACTIVE TRANSPORTATION (BICYCLE & PEDESTRIAN) COMPLETE STREETS PLANNING AND COORDINATION**

A. Previous Work: This funding is being combined with SB1 based formula funding to deliver the Innovation in Bike and Pedestrian Project Delivery study incorporating an update to the 2012 regional bike plan and providing data and grant writing packages to local jurisdictions to aid project development. Work to date includes staff work to refine the project scope, the procurement process, and initial project kick-off work. Please see WE 601.0181 for more detailed information.

B. Purpose: To develop complete street standards and policies to be included and coordinated with other bicycle and pedestrian studies and plans.

C. Tasks:

1. Review Caltrans and FHWA guidance documents, as well as research best practices to integrate appropriate standards and policies into active transportation planning and project development.
2. Develop policies and vet with appropriate stakeholders and local agency partners.
3. Develop guidance documents and provide technical assistance to project sponsors for appropriate integration into project scopes.
4. Funding will supplement tasks to be completed under WE 601.0181.

D. Products and Schedule:

1. Document review and best practices report – July 2025
2. Prototype policy development and review – August 2025
3. Final guidance for SJCOG and local agency partners – September 2025

E. Funding Source:

Federal Highway Administration PL FY25/26	\$42,429.00
Federal Highway Administration PL Carryover FY23/24	\$43,239.00
Federal Highway Administration PL Carryover FY24/25	\$46,585.00

F. Responsible Agency:

SJCOG  
\$132,253.00

G. Staff Required: (person-months)

SJCOG  
1.0

## **603.01 STREETS AND HIGHWAYS COORDINATION**

- A. Previous Work: SJCOG has provided ongoing technical assistance for the delivery of local roadway and state highway facilities throughout San Joaquin County. This includes participation in the delivery of projects funded through the Measure K Congestion Relief and Railroad Crossing Safety programs, the State Transportation Improvement Program (STIP), and local funds. SJCOG has also provided direct project management for several Measure K Congestion Relief projects. With passage of the Measure K Renewal Program as well as the State Proposition 1B Transportation Bonds in November 2006, SJCOG is providing direct project management support to additional projects funded by these programs. SJCOG also works closely with Caltrans to monitor and participate and project delivery activities of State Highway improvements, including cost, scope, and schedule, pursuant to SB45. SJCOG is also an active member of Project Development Teams for regionally significant projects throughout the County.

The SJCOG Board approved nearly \$20 million of Measure K-funded Bicycle/Pedestrian/Safe Routes to School and Smart Growth Projects. This includes supplementing cycles of Active Transportation Program calls for projects administered by the California Transportation Commission in order to increase the amount of funding available to partner agencies. These projects all require oversight and contract administration by SJCOG for several years to monitor project initiation through project construction completion/implementation.

- B. Purpose: To provide technical assistance for the delivery of local roadway and state highway facilities, and bicycle/pedestrian/safe routes to school projects. To provide project management for Measure K Congestion Relief projects and Measure K Renewal Early Action Program of Projects. To provide project oversight and direct involvement in the delivery of Proposition 1B Transportation Infrastructure Bond projects, SB 1 funded projects, as well as Trade Corridor Improvement Fund projects. For Measure K, STIP, and Proposition 1B or SB1 projects this includes the selection and administration of consultant contacts for purposes of project development and project management. This work element also includes project oversight and direct involvement in the delivery of State Highway Project Study Reports and other Preliminary Engineering Studies. This may include work related to the selection and administration of consultant contracts for this purpose. To participate in project development teams and technical review of products. To interact with project sponsors and Caltrans.

- C. Tasks:

1. Provide ongoing project-level technical assistance for the delivery of local roadway and state highway facilities throughout San Joaquin County.
2. Coordination of local and state highway, bicycle/pedestrian/ safe routes to school projects for Measure K Renewal Program.
3. Identify development of Project Study Reports (PSRs) or Project Initiation Documents (PIDs).
4. Monitor SB 45 Reports, other project delivery, and project cost information per

- the Caltrans MOU and attend project delivery meetings.
5. Oversee the delivery of project development components of Measure K, Measure K Renewal Program, STIP, and SB1 projects, coordinating with Caltrans, FHWA, local jurisdiction, and technical consultant support.
  6. Develop, procure, and administer consultant contracts for purposes of project delivery, construction, and project management as it relates to Measure K funded projects.
  7. Prepare periodic delivery and progress reports for Measure K Renewal, state/federally funded programs including STIP and SB1.
  8. Review preliminary engineering project reports and environmental documents to provide input from a planning, programming, and air quality conformity perspective as an RTPA and MPO.
  9. Staff and implement the SJCOG Project Development Committee.
  10. Continued work on the Preliminary Design phase for the SR 99/120 Connector Project (Phase 1B).
  11. Provide oversight to construction for SR 99/120 Connector Project Phase 1A.
  12. Continued work on the project development activities related to various regional arterials in the Measure K Program.
  13. Where applicable, implement the Planning and Environment Linkages (PEL) process which is a collaborative and integrated approach to transportation decision-making. Incorporating PEL means considering the benefits and impacts of proposed transportation system improvements to the environment, community, and economy during the transportation planning process.

D. Products & Schedule:

1. Meetings with partners in the delivery of Measure K local roadway – Operational Activities with Deliverables Reported on Quarterly Basis, through June 2026.
2. Correspondence related to coordination of local and state highway projects for Measure K Renewal, including close-out activities for construction on pertinent state highway projects. – Operational Activities with Deliverables Reported on Quarterly Basis, through June 2026.
3. Meetings with partners to identify and participate in the development of Project Study Reports and Project Initiation Documents— monthly through June 2026.
4. Technical memoranda and related correspondence which develop information, set priorities, and prepare Project Nominations— Operational Activities with Deliverables Reported on Quarterly Basis., through June 2026.
5. Project-level technical assistance to local partner jurisdictions— Operational Activities with Deliverables Reported on Quarterly Basis through June 2026.
6. Delivery reports under SB 45 and any other reports required by the California Transportation Commission – Quarterly through June 2026.
7. Management of consultant contracts for project delivery where SJCOG serves as a lead agency – Operational Activities with Deliverables Reported on a Quarterly Basis through June 2026.
8. Review of project preliminary and technical reports as a RTPA and MPO – as needed through June 2026.
9. Prepare for and hold Project Development Committee meetings through June 2026.

- E. Funding Sources:  
Local Transportation Fund (COG) \$50,000.00  
Local Transportation Authority (LTA) \$235,352.00
- F. Responsible Agency:  
SJCOG  
\$285,352.00
- G. Staff Required: (person-months)  
SJCOG  
4.0

## **603.015 I-205 MANAGED LANES PROJECT DEVELOPMENT**

- A. Previous Work: The environmental document is well underway with the release of the notice of preparation, scoping meeting, ongoing stakeholder coordination and public outreach, and completion of technical studies. During the just previous fiscal year, the project team has completed numerous technical studies, worked at developing and vetting project alternatives, and coordinating with Caltrans and other project stakeholders.
- B. Purpose: To provide technical assistance for the delivery of project development activities for the I-205 Managed Lanes Project. The project proposes to widen I-205 from 6 to 8 lanes. This work element also includes project oversight and direct involvement in the delivery of the Project Approval and Environmental Document and may include subsequent project development activities such as Plans, Specifications, and Estimates after completion of the Environmental Document. The project has secured an E76 authorization to proceed from Caltrans (dated November 2019).
- C. Tasks:
1. Coordination of FHWA Project of Division Interest process and all FHWA requirements
  2. Organize & implement kick-off meeting to be held for the introduction of staff, roles, and responsibilities, establishment of communication channels, clarification of procedures and formats to be used, and discussion of design considerations.
  3. Organize and lead Project Development Team (PDT) meetings for the review of project status and the determination of needed actions; prepare all PDT meeting notices, agenda, and minutes.
  4. Organization, participation, and presentations at meetings held by lead agency staff with elected officials, neighborhood groups, and other stakeholders.
  5. Coordination with consultants and other public agencies.
  6. Coordination with utility companies to identify conflicts and relocation plans.
  7. Coordination with Union Pacific Railroad.
  8. Development and monitoring of critical path schedule, project expenditures, monthly invoices, and progress reports.
  9. Preparation of all required environmental studies and documentation necessary for CEQA/NEPA approvals. The anticipated level of environmental document is an Environmental Impact Report/Environmental Assessment (EIR/EA).
  10. Freeway/Maintenance Agreement support.
  11. Preparation and/or peer review of technical environmental reports and analyses (greenhouse gas studies, traffic studies, value analysis studies, noise studies, resource, and regulatory permits, etc.).
  12. Project Report (Preliminary Engineering).
  13. Public hearings, map showings, and public outreach for CEQA/NEPA approvals.
  14. Preparation of Supplemental Project Initiation Document (PID) as required by Caltrans District 4 for revised project scope and limits.

15. Preparation of Value Analysis Study.

D. Products & Schedule:

The final work product would be the I-205 Project Approval and Environmental Document to be completed by late 2027.

E. Funding Sources:

Regional Surface Transportation Program (CML6088-068)	\$4,000,000.00
Regional Transportation Impact Fee (RTIF)	\$341,491.00
Surface Transportation Block Grant (STBG)	\$1,981,785.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$ 0.00	\$6,323,276.00

G. Staff Required: (person-months)

SJCOG Consultant Contract

**603.018 RTE 99/120 PHASE 1B DESIGN**

- A. Previous Work: The project is in its Plans, Specifications, and Estimates (PS&E) phase. In prior years, the project team has completed numerous technical studies and achieved completion of its Project Approval and Environmental Document (PA&ED) phase.
  
- B. Purpose: To provide technical assistance for the delivery of project development activities for the SR 99/120 Connector Project Phase 1B. This work element also includes project oversight and direct involvement in the delivery of PS&E documentation. The project has secured an E76 authorization to proceed from Caltrans.
  
- C. Tasks:
  - 1. Coordination of FHWA Project of Division Interest process and all FHWA requirements.
  - 2. Organize & implement kick-off meeting to be held for the introduction of staff, roles, and responsibilities, establishment of communication channels, clarification of procedures and formats to be used, and discussion of design considerations.
  - 3. Organize and lead Project Development Team (PDT) meetings for the review of project status and the determination of needed actions; prepare all PDT meeting notices, agenda, and minutes.
  - 4. Organization, participation, and presentations at meetings held by lead agency staff with elected officials, neighborhood groups, and other stakeholders.
  - 5. Coordination with consultants and other public agencies.
  - 6. Coordination with utility companies to identify conflicts and relocation plans.
  - 7. Coordination with Union Pacific Railroad.
  - 8. Development and monitoring of critical path schedule, project expenditures, monthly invoices, and progress reports.
  - 9. Preparation of all required documentation necessary for PS&E approvals.
  
- D. Products & Schedule: The final work product would be the SR 99/120 Connector Project Phase 1B final design to be completed by 2029.
  
- E. Funding Sources:  
Federal Community Project Funding:     \$5,500,000.00
  
- F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$0.00	\$5,500,000.00
  
- G. Staff Required: (person-months)  
SJCOG Consultant Contract

## **603.02 TRANSIT COORDINATION AND PLANNING**

- A. Previous Work: This effort has been undertaken in conjunction with the efforts of San Joaquin Regional Transit District (RTD), local transit providers throughout the county, FTA and Caltrans District 10. SJCOG has been highly involved in transit planning and coordination. In previous fiscal years, this included work on the Proposition 1B PTMISEA and TSSSDRA Program Expenditure Plan and corresponding amendments, FTA 5311 Program of Projects, and FTA 5310 application review, the annual unmet needs assessment, participation in development and review of short-range transit plan updates, and the Measure K Renewal Strategic Plan Update. SJCOG continues work with San Joaquin Regional Rail Commission (SJRRRC), High-Speed Rail Authority, Tri-Valley San Joaquin Valley Rail Authority (Valley Link), the San Joaquin Joint Powers Authority (SJJPA), and Bay Area Partners on the study of passenger rail service and connectivity improvements on the Altamont Pass, to Sacramento and throughout the San Joaquin Valley. SJCOG is active in development and/or implementation of Measure K operating and capital cooperative agreements with RTD and other transit operators; staffs the Social Services Transportation Advisory Council (SSTAC), and Interagency Transit Committee (ITC); and is an ex-officio member of the Regional Rail Commission. SJCOG completed Proposition 1B PTMISEA, TSSSDRA, and Homeland Security project selection and allocations and the Measure K Renewal Transit Section allocations.
- B. Purpose: To comply with Federal Transit Administration and state mandates. To ensure that transit services in the county are fully coordinated. To increase transit ridership and efficiency in San Joaquin County. To increase accessibility and mobility for the transportation disadvantaged. To coordinate Measure K passenger rail and bus Project delivery and administration. Develop and implement rational strategies that optimize the ability for people on welfare to access employment opportunities. To coordinate with RTD, SJRRRC, and all transit operators in the County to prepare short-range and comprehensive transit planning documents.
- C. Tasks:
- All tasks will be completed by SJCOG staff without the assistance of outside consultants.
1. Prepare FTA 5311 Program of Projects for FY 25/26. Monitor delivery of Program of Projects, to include passthrough funds for the City of Escalon's short range transit plan (*funded with Transportation Development Act (TDA) and not CPG*).
  2. Monitor delivery of programmed projects using FTA 5307 for transit operators. (funded with LTF/State Transit Assistance and not CPG).
  3. Prepare 5310 funding call for projects, and review funding recommendations and programming in conjunction with Caltrans. Periodic monitoring of delivery of Program of Projects (*funded with LTF/State Transit Assistance and not CPG*).
  4. Coordinate review of final OWP and planning studies, opportunities for review with all transit providers in the county. Ensure transit is aware of and represented in all appropriate studies (funded with CPG).

5. Participate in policy and technical working group for rail planning efforts and any studies with SJRRC, SJJPA, High-Speed Rail Authority, and the Tri-Valley – San Joaquin Valley Regional Rail Authority. Review Final technical products. Develop/participate in public outreach sessions. *(funded with LTF/State Transit Assistance and not CPG)*
6. Continue staff support and coordination of the ITC (funded with CPG).
7. Serve as staff and oversee activities of the Social Service Transportation Advisory Council. Prepare and implement annual work program *(funded with LTF/State Transit Assistance and not CPG)*.
8. Assist with bus transit financial and operational planning. Activities will include assistance with grant applications, ensuring coordination among different transit providers and consistency between their plans and regional transit plans, monitoring transit performance, and keeping track of the lapsing date of various FTA funds *(funded with Measure K/LTF/State Transit Assistance and not CPG)*.
9. Participate as an ex-officio member of Regional Rail Commission. Provide staff support to Rail Commission and other rail committees. Rail Commission Board meetings are held monthly. Technical meetings or correspondence to support Rail activities occur at least monthly *(funded with Measure K/LTF/State Transit Assistance and not CPG)*.
10. Coordination of passenger rail and bus transit projects for Measure K. *(funded with Measure K and not CPG)*
11. Prepare Transit Unmet Needs Analysis and report *(funded with CPG)*
12. Conduct outreach efforts to traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e., Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders *(funded with CPG)*.
13. Develop/amend Measure K Renewal Coops with RTD, RRC, and other transit operators, as applicable *(funded with Measure K and not CPG)*.
14. Monitor and implement planning activities per approved Memorandums of Understandings (MOUs) with rail and bus transit operators in the region. These MOUs reflect the latest FHWA/FTA planning regulations and better articulate roles and responsibilities between the MPO and transit operator *(funded with Measure K/LTF/State Transit Assistance and not CPG)*.
15. Staffing and oversight of the Transit Ad Hoc Committee which will examine MOUs with regional transit providers and develop recommendations for comprehensive assessment and programming of local, state, & federal funds *(funded with Measure K/LTF/State Transit Assistance and not CPG)*.
16. Ensure compliance with federal Transit Asset Management Plan guidelines. *(funded with LTF/State Transit Assistance and not CPG)*

D. Products & Schedule:

All work products will be delivered by SJCOG staff without assistance from outside consultants.

1. Meetings, staff reports, and correspondence to document activities where SJCOG serves as staff and oversees activities of the Social Service Transportation Advisory Committee and the Interagency Transit Committee. (Operational activities with deliverables reported on a quarterly

- basis through June 2026)
2. Prepare and implement annual work program (*funded with LTF/State Transit Assistance* – Operational activities with deliverables reported on a quarterly basis through June 2026.
  3. Meetings and correspondence to assist with bus transit financial and operational planning (*funded with Measure K/LTF/State Transit Assistance*). – Operational activities with deliverables reported on a quarterly basis through June 2026.
  4. Monitor delivery of short-range transit plan and receive a copy of final document, to be completed by end of FY2025/26.
  5. Meetings and correspondence to assist with passenger rail financing plans and efforts (*funded with Measure K/LTF/State Transit Assistance and not CPG*)– Operational activities with deliverables reported on a quarterly basis through June 2026.
  6. Meeting attendance to participate as an ex-officio member of Regional Rail Commission (*funded with Measure K /LTF/State Transit Assistance, not CPG*) – Operational activities with deliverables reported on a quarterly basis through June 2026.
  7. Meeting attendance to participate as a technical advisory member for the Tri-Valley- San Joaquin Valley Regional Rail Authority (*funded with Measure K /LTF/State Transit Assistance, not CPG*) – Operational activities with deliverables reported on a quarterly basis through June 2026.
  8. Meeting attendance and correspondence related to coordination of passenger rail and bus transit projects for Measure K (*funded with Measure K, not CPG*) – Operational activities with deliverables reported on a quarterly basis through June 2026.
  9. Complete Unmet Transit Needs Analysis Report for FY 2025/26 – July 2025 (funded with CPG).
  10. Completed Development submittal and recommended selection of FTA 5310, and 5311, grant applications (*funded with LTF/State Transit Assistance, not CPG*)– Operational activities with deliverables reported on a quarterly basis through June 2026.
  11. Work products from the Transit Ad Hoc Committee – through June 2026 (*funded with Measure K/LTF/State Transit Assistance and not CPG*).
  12. Document public transit outreach efforts and meetings with traditionally under-represented and under-served populations and their community leaders- Operational activities with deliverables reported on a quarterly basis through June 2026 (funded with CPG).
  13. Meeting agendas and staff reports to maintain the role of ITC in planning process–Operational activities with deliverables reported on a quarterly basis through June 2026. (funded with LTF/STA).
  14. Meeting attendance in policy and technical working group for ACE’s Valley Rail Program (Merced to Sacramento corridor) per MOU with corridor participants and California High-Speed Rail Authority. Written comments on final technical products (through June 2026).
  15. Meeting attendance in public outreach sessions (*funded with Measure K /State Transit Assistance, not CPG*) – Operational activities with deliverables reported on a quarterly basis through June 2026.
  16. Monitor and periodically attend Amtrak San Joaquin Joint Powers Authority meetings (*funded with Measure K /State Transit Assistance, not*

CPG) – Operational activities with deliverables reported on a quarterly basis through June 2026.

E.	<u>Funding Sources:</u>	
	State Transit Assistance	\$191,900.00
	Escalon Local Passthrough	\$70,000.00
	Escalon FTA 5311 Passthrough	\$30,000.00

F.	<u>Responsible Agency</u>	
	<u>SJCOG</u>	<u>Escalon</u>
	\$191,900.00	\$100,000.00

G.	<u>Staff Required: (person-months)</u>	
	<u>SJCOG</u>	
	9.0	

## **603.021 SB 125 CalSTA Program**

- A. Previous Work: This task is an ongoing function and involves the administration of the Formula-Based Transit and Intercity Rail Capital Program & Zero Emission Transit Capital Program (Senate Bill 125) received for San Joaquin County. This has included work directly with transit agencies and the SJCOG Board to establish policy direction for fund distribution.
- B. Purpose: Senate Bill 125 gave extensive responsibilities to the Regional Transportation Planning Agencies for administering TIRCP and ZETCP funds. Local governments depend upon these funds and the proper administration of them for the continued operation of transit services.
- C. Tasks:
1. Develop apportionments for SB 125 funds in accordance with Statute.
  2. Update SJCOG'S Rules and Regulations for administering the SB 125 funds as a result of changes that may occur from new legislation or policy changes.
  3. Process invoice for SB 125 funds: a) Review invoices for compliance with statutes, regulations, and Regional Transportation Plan; b) Prepare staff reports and resolutions; c) Transmit allocation instructions to County Auditor consistent with section 6659 of the California Code of Regulations.
  4. Prepare SB 125 Annual Report.
  5. Contract with an accounting firm to carry out in a timely fashion the annual financial and compliance audits.
  6. Continue to maintain an in-house accounting of SB 125 funds received and disbursed.
  7. SJCOG staff will continue to provide information to State agencies on SB 125 policy issues and will continue to monitor, evaluate, and comment upon State legislation dealing with SB 125.
  8. Convening regular check-in meetings with staff and partners, meeting preparation and develop staff reports.
- D. Product & Schedule:
1. Execute SB 125 Funds Transfer Agreements – September through December 2025
  2. Program Administration – Continuous Review of Operational Activities and Deliverables through June 2026
  3. Documented approval of SB 125 Invoices – Operational Activities with Deliverables Reported on Quarterly Basis through June 2026.
  4. Updated SJCOG SB 125 Rules and Regulations, if needed – March 2026
  5. SB 125 Annual Report – October 2025.

E. Funding Sources:

Transit & Intercity Rail Capital Program (TIRCP) FY25/26	\$200,178.42
Zero Emission Transit Capital Program (ZETCP) FY25/26	\$28,227.23

F. Responsible Agency:

SJCOG  
\$228,405.65

G. Staff Required: (person-months)

SJCOG  
3.0

## **603.0201: Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan**

- A. Previous Work: Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan (Project) will build on the efforts of the Valley Rail Expansion Program to integrate the future rail network and its operations with the Cabral Station, Downtown Transit Center (DTC), and surrounding transportation network and land use within Downtown Stockton.

Completed Work Products: To date, the project kick-off meeting with Caltrans staff took place January 2024. The City of Stockton finalized procurement for professional consultant services to develop the Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan Task 1 (October – December 2024) Selected consultant and finalized contract for professional services (October – December 2024) Project Kickoff (December 2024)

- B. Purpose: To administer the FY 23/24 Caltrans Strategic Partnership - Transit Competitive Grant project; the Downtown Stockton Multimodal Transportation Network and Land Use Compatibility Action Plan aims to integrate the future rail network with key transportation hubs and surrounding land use in Downtown Stockton. It focuses on engaging disadvantaged communities, suggesting infrastructure improvements, joint-development, and transit-oriented developments to create cohesion and revitalize the area, aligning with the Valley Rail Expansion Program and guided by Smart Mobility, Complete Streets, and climate action principles. Collaborating with partners like SJCOG, the City of Stockton, SJRRC, SJJPA, RTD, and Caltrans, the project seeks to develop a safe, vibrant, and sustainable community that reduces car reliance and promotes walking and biking between local and regional transit services.
- C. Tasks: Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant, some tasks will carry over into subsequent fiscal years). This project is expected to be completed within 24 months of the notice to proceed to the project consultant.

### Task 01: Project Administration:

Task 01.1: Management and oversight of project and deliverables, as well as project kick-off, invoicing and budget tracking, and progress reporting to Caltrans.

Task 01.3: Quarterly Invoices & Progress Reports

Task 01.4: Staff will coordinate monthly check-in meetings to go over program progress.

### Task 02: Consultant Procurement (task completed FY 24/25):

Task 02.1: The City of Stockton, in partnership with SJRRC, RTD, and SJCOG, will follow its current procedures to issue a Request for Proposal (RFP)/Request for Qualifications (RFQ) and hire a planning consultant to complete the project. Caltrans staff will be invited to participate in the consultant selection process. The City will execute a contract with the final selected firm by the procurement panel consistent with City of Stockton contract guidelines and procedures. The city will share the final executed

contract with Caltrans.  
Task 02.2: Request for Proposals  
Task 02.3: Consultant Contract

#### Task 1: Existing Conditions:

Task 1.1: This task will involve the consultant conducting a literature review, perform a site walk, and developing an existing conditions analysis of current and planned land uses and multimodal conditions, including pedestrian, bicycle, transit, and vehicular modes. Existing conditions will consider a number of project area factors, including but not limited to existing multimodal access, origins and destinations, housing needs, market conditions, parking needs, safety needs, and homelessness concerns. The Existing conditions will leverage maps, photos, and other graphic content to create a visually appealing and digestible report.

Task 1.2: Existing Conditions Report

#### Task 2: Stakeholder & Public Engagement:

Task 2.1: This task will involve the consultant conducting a literature review, perform a site walk, and developing an existing conditions analysis of current and planned land uses and multimodal conditions, including pedestrian, bicycle, transit, and vehicular modes. Existing conditions will consider a number of project area factors, including but not limited to existing multimodal access, origins and destinations, housing needs, market conditions, parking needs, safety needs, and homelessness concerns. The Existing Conditions will leverage maps, photos, and other graphic content to create a visually appealing and digestible report.

- Previous studies and current initiatives may include:
  - 2022 Regional Transportation Plan/Sustainable Communities Strategy, San Joaquin Council of Governments
  - Envision Stockton 2040 General Plan
  - SJCOG Sustainable Communities Strategy (SCS) Implementation Study (Regional Needs Assessment and South Stockton Mobility Pilot Study, June 2020)
  - SJCOG Community, Diversity, and Displacement Study and Housing Policy Toolkit (February 2022).
  - Economic Development Strategic Action Plan, City of Stockton
  - Sustainable Neighborhood Plan, City of Stockton
  - ACE Planning and Parking Strategy, Cabral Station (2011)
  - Robert J. Cabral Station Master Plan Update (2008)
  - Robert J. Cabral Station Neighborhood: A Plan for Revitalizing East Downtown Stockton (2005)
  - California Transportation Plan 2050, California Department of Transportation
  - 2018 California State Rail Plan, California Department of Transportation
  - Toward an Active California, California Department of Transportation
  - Complete Streets, California Department of Transportation
  - Climate Action Plan for Transportation Infrastructure, California State Department of Transportation

- Safe Systems Approach, Federal Highway Administration
- Justice 40, White House Executive Order 14008

Task 2.2: Public Engagement Plan

Task 2.3: Public Engagement Summary

Task 3: Equity & Displacement Analysis:

Task 3.1: This task will develop an equity analysis which will include maps based on various State and Federal definitions such as historically disadvantaged communities, areas of persistent poverty, and other forms of demographic analysis to determine how the project benefits the community. This task will also include an analysis of displacement of residents and those experiencing homelessness and identify mitigations to reduce the potential impacts that build upon previously completed displacement studies adopted by the City.

Task 3.2: State and Federal DAC Definition Maps

Task 3.3: Displacement analysis and mitigations

Task 3.4: Benefits Summary

Task 4: Alternatives Analysis

Task 4.1: This task involves a high-level analysis of multimodal connectivity, land use, zoning, economic, marketing, and development strategies. This effort will result in various reports, plans, maps, visual renderings, additional graphic content, and recommendations on how desired outcomes like complete streets, joint development, transit-oriented development (TOD), and a safe, secure, sustainable, multimodal community may be achieved, and package recommended strategies into a set of project alternatives. The Alternatives Analysis will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers

Task 4.2: Land Use and Transportation Consistency Review

Task 4.3: Toolbox Strategies

Task 4.4: Draft Alternatives

Task 4.5: Recommended Final Alternative

Task 5: Project Strategy & Action Plan:

Task 5.1: The Consultant will prepare a project strategy that includes a financial plan which will detail project cost estimates, private and public funding options, and other relevant financial information. The financial plan will identify strategies that best position the project for future grant pursuits and to capitalize on public and private sources of funding, including a roadmap for the efficient implementation of project components. The project strategy will build on the financial plan to identify an implementation plan that delivers the project. The implementation plan will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers, to establish project phasing and priorities that are consistent with project objectives. Project phasing will be tied to funding sources identified in the financial plan and will identify major milestones, goals, and deliverables for each phase.

Task 5.2: Financial Plan

Task 5.3: Action and Phasing Plan

Task 6: Summary Report:

Task 6.1: In this task the Consultant will prepare the draft and final report detailing the findings of existing conditions, stakeholder and public engagement activities, the alternatives analysis, and action plan. The draft report will be shared with Caltrans, community-based organizations, the development community, and other project stakeholders, including the general public, to solicit input on recommended strategies. Feedback received will be incorporated into the Project's final report, which will be distributed among project partners once adopted. The project partners will then use the final report as a guide to identify future funding opportunities for implementing proposed strategies.

Task 6.2: Summary Report

Task 6.3: Final Study Presentations

D. Products and Schedule:

- The procurement process and executed consultant contract was completed by December 2024.
- On-going staff and consultant coordination meetings / meeting notes – July 2024 – June 2026 (carries over into subsequent fiscal years)
- A. Existing Conditions Report, led by consultant, conducting a literature review, perform a site walk, and developing an existing conditions analysis of current and planned land uses and multimodal conditions, including pedestrian, bicycle, transit, and vehicular modes – March 2025 – July 2025
- B. Stakeholder & Public Engagement Plan/Summary & meetings; consultant will coordinate and facilitate stakeholder and public engagement efforts identified in the public engagement strategy which will document the activities and the results of engagement. - June 2025 – June 2026
- C. Equity & Displacement Analysis benefits summary, analysis of displacement of residents and those experiencing homelessness and identify mitigations to reduce the potential impacts that build upon previously completed displacement studies adopted by the City – November 2025 – March 2026
- D. Alternatives Analysis will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers – September 2024 – July 2025
- E. Project Strategy & Action Plan, consultant will prepare a project strategy that includes a financial plan which will detail project cost estimates, private and public funding options, and other relevant financial information and the project phasing will be tied to funding sourced identified. – January 2025 – July 2025
- A. Final Summary report for partnerships, funding, and long-term sustainability; Final recommendations for program implementation – February 2026 – June 2026 (will carry over into subsequent fiscal year)
- B. City Council Review/Approval Adoption- (expected beyond current fiscal year - August 2025 – September 2025)

E. Funding Source:

Caltrans Strategic Partnerships (FTA 5304)	\$425,000.00
City of Stockton Local Match (Cash)	\$18,000.00

City of Stockton In-Kind Match (Local) \$37,250.00

F. Responsible Agency:

SJCOG

City of Stockton

\$7,000.00

\$473,250.00

Staff Required: (person-months)

SJCOG

1.00

**603.0202 LODI MULTIMODAL TRANSPORTATION NETWORK AND LAND USE COMPATIBILITY ACTION PLAN**

- A. Previous Work: This was a new grant for FY 24/25. No work has been completed to date. Lodi Multimodal Transportation Network and Land Use Compatibility Action Plan (Project) will build on the efforts of the Valley Rail Expansion Program to integrate the future rail network and surrounding transportation network and land use with the existing Lodi Transit Station in Downtown Lodi.
- B. Purpose: To administer the FY 24/25 Caltrans Strategic Partnership - Transit Competitive Grant project; the Lodi Multimodal Transportation Network and Land Use Compatibility Action Plan will identify current and future rail systems, multimodal networks, and increased connectivity and development land usage within the Plan scope area. This will involve directly engaging underserved communities regarding employment access, housing and business opportunities, cost-effective travel for non-vehicle owners, bicycle, and pedestrian facilities, and expanding regional transportation services. Plan development will expand local and regional connectivity, support the economic development of wine tourism, and encourage residents to utilize multimodal travel options for regional commutes to work and recreation.
- C. Tasks: Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant, some tasks will carry over into subsequent fiscal years). This project is expected to be completed within 28 months of the notice to proceed to the project consultant.

Task 01: Project Administration:

Task 01.1: Management and administration tasks will be undertaken by the City of Lodi.

Task 01.2: Meeting Notes for Caltrans Grant Kick-off Meeting

Task 01.3: DBE Report

Task 02: Consultant Procurement:

Task 02.1: The City of Lodi, in partnership with SJCOG, SJRCC, and SJJPA, will follow its current procedures to issue a Request for Proposal (RFP)/Request for Qualifications (RFQ) and hire a planning consultant to complete the project. Caltrans staff will be invited to participate in the consultant selection process. The City will execute a contract with the final selected firm by the procurement panel consistent with City of Lodi contract guidelines and procedures. The city will share the final executed contract with Caltrans.

Task 02.2: Request for Proposal and Qualifications of Applicant

Task 02.3: Contract between consultant and grantee

Task 02.4: Copies of the contract and additional amendments to the consultant agreement

Task 02.5: PM and/or Caltrans Check-in Meeting Notes

Task 02.6: Quarterly Invoices and Progress Reports

Task 1: Existing Conditions:

Task 1.1: This task will involve the consultant conducting a literature review,

performing a site walk, and developing an existing conditions analysis of current and planned land uses and multimodal conditions, including pedestrian, bicycle, transit, and vehicular modes. Existing conditions will consider a number of project area factors, including but not limited to existing multimodal access, origins and destinations, housing needs, market conditions, parking needs, safety needs, and homelessness concerns. The consultant will leverage maps, photos, and other graphic content to create a visually appealing and digestible report.

- Previous studies and current initiatives may include:
- 2022 Regional Transportation Plan/Sustainable Communities Strategy, San Joaquin Council of Governments
- California Transportation Plan 2050
- 2018 California State Rail Plan
- General Plan, City of Lodi
- Short-Range Transit Plan, City of Lodi
- Bicycle Master Plan, City of Lodi
- Countywide General Plan 2035

Task 1.2: Existing Conditions Report including documentation of census tracts and existing transportation networks within Plan scope

Task 1.3: PM and/or Caltrans Check-in Meeting Notes

Task 1.4: Quarterly Invoices and Progress Reports

## Task 2: Stakeholder & Public Engagement:

Task 2.1: This task will involve the consultant developing a stakeholder outreach and engagement strategy that includes the identification of project stakeholders, an engagement timeline, method and means for involvement, and a summary documenting engagement activities and results. The engagement strategy will incorporate a project webpage, a stakeholder working group, workgroups, pop-ups, surveys, social media, interviews, and a combination of in-person and virtual activities. Public engagement workshops will occur before, during, and after the preparation of the draft plan.

- Stakeholders may include:
  - Public agencies
  - Development community (including affordable housing, non-profit, and private developers)
  - Community-based organizations
  - Business groups (such as the Downtown Lodi Business Alliance and the Chamber of Commerce)
  - Local and regional agencies
  - City-owned utilities
  - Advocacy groups
  - Housing/resident associations

Task 2.2: Public Engagement Plan

Task 2.3: Three (3) public engagement workshops, including workshop materials and notes

Task 2.4: Engagement materials such as project webpage, surveys, and marketing materials

Task 2.5: Spanish translations for all outreach materials

Task 2.6: Public Engagement Summary

Task 2.7: PM and/or Caltrans Check-in Meeting Notes  
Task 2.8: Quarterly Invoices and Progress Reports

Task 3: Equity & Displacement Analysis:

Task 3.1: This task will develop an equity analysis which will include maps based on various State and Federal definitions such as historically disadvantaged communities, areas of persistent poverty, and other forms of demographic analysis to determine how the project benefits the community. This task will also include an analysis of resident displacement and homelessness and identify actions to mitigate the potential impacts.

Task 3.2: State and Federal DAC Definition Maps

Task 3.3: Displacement analysis and mitigations

Task 3.4: Benefits Summary

Task 3.5: PM and/or Caltrans Check-in Meeting Notes

Task 3.6: Quarterly Invoices and Progress Reports

Task 4: Alternatives Analysis

Task 4.1: This task involves a high-level analysis of multimodal connectivity, land use, zoning, economic, marketing, and development strategies. This effort will result in various reports, plans, maps, visual renderings, additional graphic content, and recommendations on how desired outcomes like complete streets, joint development, transit-oriented development (TOD), and a safe, secure, sustainable, multimodal community may be achieved, and package recommended strategies into a set of project alternatives. The Alternatives Analysis will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers.

Task 4.2: Land Use and Transportation Consistency Review

Task 4.3: Toolbox Strategies

Task 4.4: Draft Alternatives

Task 4.5: Recommended Final Alternative

Task 4.6: PM and/or Caltrans Check-in Meeting Notes

Task 4.7: Quarterly Invoices and Progress Reports

Task 5: Project Strategy & Action Plan:

Task 5.1: The Consultant will prepare a project strategy that includes a financial plan which will detail project cost estimates, private and public funding options, and other relevant financial information. The financial plan will identify strategies that best position the project for future grant pursuits and to capitalize on public and private sources of funding, including a roadmap for the efficient implementation of project components. The project strategy will build on the financial plan to identify an implementation plan that delivers the project. The implementation plan will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers, to establish project phasing and priorities that are consistent with project objectives. Project phasing will be tied to funding sources identified in the financial plan and will identify major milestones, goals, and deliverables for each phase.

Task 5.2: Financial Plan

Task 5.3: Action and Phasing Plan

Task 5.4: PM and/or Caltrans Check-in Meeting Notes

## Task 5.5: Quarterly Invoices and Progress Reports

### Task 6: Draft and Final Plan

Task 6.1: In this task, the Consultant will prepare the draft and final report detailing the findings of existing conditions, stakeholder and public engagement activities, the alternatives analysis, and action plan. The draft report will be shared with Caltrans, SJRCC, SJJPA, community-based organizations, the development community, and other project stakeholders, including the general public, to solicit input on recommended strategies.

Feedback received will be incorporated into the Project's final report, which will be reviewed and adopted by the City Council and distributed among project partners. The project partners will then use the final report as a guide to identify future funding opportunities for implementing proposed strategies.

Task 6.2: Draft Plan and Final Report in ADA-accessible format

Task 6.3: Documentation of comments and feedback received on draft plan

Task 6.4: Internal Reviews and Approvals

Task 6.5: Final Study Presentations

Task 6.6: PM and/or Caltrans Check-in Meeting Notes

Task 6.7: Quarterly Invoices and Progress Reports

### D. Products and Schedule:

- The procurement process and executed consultant contract will be completed by February 2025.
- On-going staff and consultant coordination meetings / meeting notes – November 2024 – June 2027
- F. Existing Conditions Report, led by consultant, conducting a literature review, performing a site walk, and developing an existing conditions analysis of current and planned land uses and multimodal conditions, including pedestrian, bicycle, transit, and vehicular modes – March 2025 – September 2025
- G. Stakeholder & Public Engagement Plan/Summary & meetings; consultant will coordinate and facilitate stakeholder and public engagement efforts identified in the public engagement strategy which will document the activities and the results of engagement. - July 2025 – June 2026 (carries into subsequent fiscal years)
- H. Equity & Displacement Analysis, where consultant will analyze displacement of residents and those experiencing homelessness and identify mitigations to reduce the potential impacts. – November 2025 – April 2026
- I. Alternatives Analysis will reflect the findings of stakeholder input from Task 2, including the results of any conversations with developers – January 2026 – June 2026 (carries into subsequent fiscal years).
- J. Project Strategy & Action Plan, where consultant will prepare a project strategy that includes a financial plan which will detail project cost estimates, private and public funding options, and other relevant financial information which the project phasing will be tied to (completes in subsequent fiscal years).
- C. Final Summary Report for partnerships, funding, and long-term sustainability; review and adoption of final plan by City Council. (completes in subsequent fiscal years).

### E. Funding Source:

Caltrans Strategic Partnerships (FTA 5304)	\$450,000.00
City of Lodi Local Match (Cash)	\$11,700.00
City of Lodi In-Kind Match (Local)	\$46,800.00

F. Responsible Agency:

<u>SJCOG</u>	<u>City of Lodi</u>
\$0	\$508,500.00

Staff Required: (person-months)

<u>SJCOG</u>
1.00

**603.0203 FLOOD ADAPTATION STRATEGY FOR STATE ROUTE 4 THROUGH THE SAN JOAQUIN DELTA RIVER**

- A. Previous Work: This was a new grant for FY 24/25. No work has been completed to date. The Flood Adaptation Strategy for State Route 4 (SR-4) through the San Joaquin Delta River (Project) will build on the 2020 Climate Vulnerability Assessment and 2022 Regional Resiliency Implementation Plan and Adaptation Guidance by developing a data-driven investment strategy for SR-4. The Project was identified as a priority adaptation strategy in the 2022 Regional Resiliency Implementation Plan and Adaptation Guidance.
  
- B. Purpose: To administer the FY 24/25 Caltrans Climate Adaptation Planning Competitive Grant project; the Project will assess flood impact, including the impact a flood event in the San Joaquin River Delta will have on evacuation routing, and generate a list of priority flood resilient capital improvement projects that SJCOG in partnership with Caltrans District 10 could program on SR-4. The Project will build climate and infrastructure resilience in the region by protecting SR-4 through the San Joaquin Delta River against current and future flood risk and ensuring the continued safety and reliability of the regional transportation network.
  
- C. Tasks: Tasks include project management, consulting assistance, technical research and analysis, and grant contract fiscal management as detailed below (tasks are for the full performance period of the grant, some tasks will carry over into subsequent fiscal years). This project is expected to be completed within 16 months of the notice to proceed to the project consultant.

Task 01: Project Administration:

Task 01.1: Management and oversight of project and deliverables, as well as project kick-off, invoicing and budget tracking, and progress reporting to Caltrans.

Task 01.2: Quarterly Invoices & Progress Reports

Task 01.3: Staff will coordinate bi-weekly check-in meetings to go over program progress.

Task 02: Consultant Procurement:

Task 02.1: SJCOG will follow its current procedures to issue a Request for Proposal (RFP)/Request for Qualifications (RFQ) and hire a planning consultant to complete the project. Caltrans staff will be invited to participate in the consultant selection process. SJCOG will execute a contract with the final selected firm by the procurement panel consistent with SJCOG contract guidelines and procedures. SJCOG will share the final executed contract with Caltrans.

Task 02.2: Request for Proposals

Task 02.3: Consultant Contract

Task 1: Existing Conditions:

Task 1.1: This task will involve the consultant conducting a literature review, performing a site visit, and developing an existing conditions analysis that builds on SJCOG's 2020 Climate Adaptation and Resiliency Study, which determined that the Project Area was highly vulnerable to flooding. The consultant will use maps, photos, and other graphic content to create a visually appealing and digestible

report.

Other previous studies and current initiatives may include:

- 2022 Regional Transportation Plan/Sustainable Communities Strategy, San Joaquin Council of Governments
- 2022 Regional Resiliency Implementation Plan and Adaptation Guidance Report, San Joaquin Council of Governments
- 2021 Climate Action Plan for Transportation Infrastructure, California State Transportation Agency
- 2021 California Climate Adaptation Strategy
- 2019 Strategic Plan, San Joaquin Area Flood Control Agency
- 2024 Adaptation Plan, Delta Stewardship Council

#### Task 1.2: Existing Conditions Report

#### Task 2: Stakeholder & Public Engagement:

Task 2.1: This task will involve the consultant seeking input from local stakeholders and community residents on flood-resilient implementation strategies to ensure the final adaptation strategy aligns with and supports existing climate and environmental sustainability efforts in the Delta region and addresses the needs and concerns of the region's most disadvantaged communities.

- Stakeholders may include:
  - Local and state regulatory agencies, including the Delta Stewardship Council, San Joaquin Area Flood Agency, San Joaquin County Office of Emergency Services, Contra Costa County, and Caltrans District 4
  - Existing climate initiatives in the region, including the San Joaquin Regional Climate Collaborative (RCC)
  - Other stakeholders who can be positively and/or negatively impacted by the proposed adaptation strategies, including Delta region residents, landowners, businesses, and environmental advocates

#### Task 2.2: Public Engagement Plan

#### Task 2.3: Public Engagement Summary

#### Task 3: Alternatives Analysis

Task 3.1: This task involves a high-level analysis of the sensitivity and adaptive capacity of SR-4 and the consequences failing to prepare for a flood event will have on the Project Area, including evacuation routing. This effort will result in various reports, plans, maps, visual renderings, additional graphic content, and recommendations on how desired outcomes of allowing SR-4 to withstand and recover from a flood event may be achieved, and package recommended strategies into a set of project alternatives. Each alternative will be evaluated using a cost-benefit analysis and will incorporate the needs and concerns collected in Task 2.

#### Task 3.2: Draft Alternatives

#### Task 3.3: Recommended Final Alternatives

#### Task 4: Draft and Final Plan

Task 4.1: The consultant will develop a draft and final plan that summarizes findings from the existing conditions report, stakeholder and public engagement,

and alternative analysis and lists flood-resilient implementation strategies, costs, and potential funding opportunities. The draft plan will be shared for public comment. After public feedback is collected, the consultant will incorporate this feedback into a final plan for SJCOG Board approval. The final plan will be used by project partners as a guide to identify future funding opportunities for implementing proposed strategies.

Task 5.2: Draft Plan

Task 5.3: Final Plan

Task 5.4: Final Study Presentations

D. Products and Schedule – all work products outside of administration and procurement will be completed by SJCOG staff with contract consultant services:

- The procurement process and executed consultant contract will be completed by July 2025.
- On-going staff and consultant coordination meetings / meeting notes – July 2025 – June 2026
- Existing Conditions Report, led by consultant, conducting a literature review, performing a site visit, and developing an existing conditions analysis that builds on SJCOG’s 20202 Climate Adaptation and Resiliency Study. – July 2025 – December 2025
- Stakeholder & Public Engagement Plan/Summary & meetings; consultant will coordinate and facilitate stakeholder and public engagement efforts identified in the public engagement strategy, which will document the activities and the results of engagement. – August 2025 – December 2025
- Alternatives Analysis will reflect the findings of stakeholder input from Task 2. – October 2025 – March 2026
- Final Report for partnerships, funding, and long-term sustainability; Final recommendations for program implementation – May 2026 –June 2026
- Board Review/Approval Adoption – June 2026

E. Funding Source:

Senate Bill 1 Competitive Grant FY24/25 SHA-CAP	\$340,840.00
SJCOG Local Match (Cash)	\$44,160.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$44,160.00	\$340,840.00

G. Staff Required: (person-months)

<u>SJCOG</u>
1.00

## **603.03 TRANSPORTATION AND AIR QUALITY PLANNING MODELING AND DATA COLLECTION**

- A. Previous Work: The San Joaquin Council of Governments (SJCOG) has a proven commitment to making transportation investments that improve air quality. Performed air quality conformity determinations for the Regional Transportation Plan and Federal Transportation Improvement Program. This work requires coordination with other Valley MPOs (San Joaquin Council of Governments, Stanislaus Council of Governments, Merced County Association of Governments, Madera County Transportation Commission, Kings County Association of Governments, Fresno Council of Governments, Tulare County Association of Governments, Kern Council of Governments), the California Air Resources Board, and the San Joaquin Valley Unified Air Pollution Control District as described more fully in Work Element 801.06.

SJCOG conducted an update to the SJCOG travel demand model. This updated model was used for the 2022 RTP update and FTIP and accompanying air quality conformity analysis. In addition, SJCOG – is following the development of new EMFAC models and will incorporate them for all air quality analyses as appropriate.

- B. Purpose: Transportation and air quality must be linked in the planning process to assure achievement and maintenance of state and federal air quality standards in San Joaquin County. This is brought home by links between air quality and transportation provided in the following statutes: SB 375 and AB 32, the California Clean Air Act, Federal Clean Air Act Amendments, and the FAST Act. SJCOG works closely with other Central Valley MPOs and the San Joaquin Valley Unified Air Pollution Control District.

It should be noted that the San Joaquin Valley is currently designated as nonattainment for the National Ambient Air Quality Standard (NAAQS) for 8-hour ozone (revoked 1997, 2008, and 2015 standards), particulate matter under 2.5 microns in diameter (PM<sub>2.5</sub>) (1997, 2006 and 2012 standards); and has a maintenance plan for particulate matter under 10 microns in diameter (PM-10).

Travel forecasts can provide data for decisions concerning transportation needs, air quality impacts, transit improvements, and land use. The model is an essential component of the Congestion Management Process. The database is useful in developing many of the other work elements and is indispensable in carrying out air quality analysis and determining the environmental and community issues to be addressed. It is also a tool often requested by local jurisdictions for technical assistance.

Collection and analysis of traffic data are used to monitor the existing network, establish trends and forecast future volumes, monitor congestion levels establish measures of effectiveness and performance.

Envision Tomorrow is a critical tool that was used to develop the Sustainable Communities Strategy land use in the RTP/SCS and involved analysis of future patterns of growth and development. Additionally, GIS-based analysis and products are being integrated by SJCOG as an essential element of many

transportation planning projects: monitoring, implementation of RTP/SCS, and related public outreach functions.

C. Tasks:

1. Air Quality Conformity and Emissions Modeling. Prepare air quality analyses as needed. This includes running EMFAC, ensuring timely implementation of all federal TCMs, and interagency consultation on methods and assumptions used for conformity. (SJCOG/Consultant)
2. Travel Model- Conformity. Update, maintain, and run travel model for conformity analyses.
3. Travel Model- Transportation Analysis. Perform model runs at the request of member agencies for transportation studies and projects.
4. Participate in SIP Development updates for ozone and particulate matter, including interagency consultation (SJCOG/Consultant).
5. Collect traffic data and transit ridership as strategically needed for performance monitoring measures and HPMS. Supplement data collected as needed by other studies. Local jurisdictional data was collected and aggregated to meet HPMS and CMP requirements.
6. Perform transportation modeling analysis required to support update and implementation of Regional Transportation Impact Fee program. Also, see WE 901.02 – Regional Transportation Impact Fee Program (RTIF). Modeling work related to the RTIF is charged under WE 901.02.
7. Provide training and experience for expansion of staff modeling expertise.
8. Conduct an assessment of needed updates, as well as an assessment and recommendation for land-use scenario planning tools for SJCOG use in various planning studies, including the RTP.
9. Documentation describing Coordinated Valley-wide completion of updated air quality conformity analysis in conjunction with the other seven MPOs – as required by new air plans and FTIP activity –June 2024 (SJCOG/Consultant)
10. Review Traffic Counts (and collection of locally available count data) for Highway Performance Monitoring System (HPMS).
11. Serve as the lead agency in the San Joaquin Valley for air quality planning and coordination of air quality conformity analysis, coordinating with the other seven MPOs.
12. Serve as the lead agency in the valley to coordinate with the San Joaquin Valley Air Pollution Control District concerning SIP development, rulemaking, and update of transportation control measures.
13. Serve as the lead agency in the valley to coordinate the development of FTIP's coordinating with FHWA, FTA, and the other seven MPOs.
14. Oversee the contract for Valley-wide air quality planning and coordination services.
15. Continue or obtain consultant services to organize interagency consultation meetings, and to support SJCOG staff in its role as valley-wide air quality coordinator.

D. Products & Schedule:

Unless otherwise noted on individual work products, work products will be delivered

by SJCOG staff with assistance from outside consultants.

1. Prepare air quality conformity determinations, model runs, and documentation for RTP and TIP amendments—Operational activities with deliverables reported on a quarterly basis through June 2026.
2. Documentation of comment on State Implementation Plan and other approved Valley Air District plans and rules to reflect the input and concerns of SJCOG and our member agencies – per Final Air District Plan Schedule – as required through June 2026 (SJCOG/Consultant).
3. Documentation of model runs to address member agency needs transportation projects and studies— Operational activities with deliverables reported on a quarterly basis through June 2026. (SJCOG/Consultant).
4. Monitor best practices in land-use scenario planning tools and implement new tools or tool updates as practical and needed through June 2026.
5. Documentation describing Coordinate Valley-wide completion of updated air quality conformity analysis in conjunction with the other seven MPOs – as required by new air plans and FTIP activity –June 2026 (SJCOG/Consultant).
6. Documentation of input on SJVAPCD and completion of updated TCM's – June 2026 – SJCOG/Consultant.

D. Funding Sources:

Federal Highway Admin PL	\$177,219.00 – Toll Credits 20,327.02
Valley MPO's	\$200,000.00

E. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$177,219.00	\$200,000.00

F. Staff Required: (person-months)

<u>SJCOG</u>
18.0

## **603.04 GOODS MOVEMENT PLANNING AND COORDINATION**

- A. Previous Work: Prior work includes: administering the Caltrans Sustainable Transportation Grant for the Valleywide Goods Movement Sustainable Implementation Plan 2015 – 2017; participation in Valleywide Goods Movement Studies in FY 2010 – 2017; participation with MTC, SACOG, and AMBAG in Mega Region Goods Movement Study 2016-2018; work on the Valleywide Goods Movement Model; participation in the Tri-County Goods Movement Committee; prior Port of Stockton access improvement studies including the SR 4 Crosstown Freeway feasibility study completed in 2005; Goods Movement chapters in the 2007, 2011, 2014, and 2018, 2022 RTP; STAA Truck Access Analysis in 2008 - 2010; continuing operation of San Joaquin Goods Movement Task Force (ongoing) and a joint SACOG/SJCOG I-5/SR-99 STAA Truck Study. In previous fiscal years, SJCOG participated in a San Joaquin Valley inland port grant-funded project led by Fresno Council of Governments. In FY 22/23, an SJCOG Truck Route Study was completed that was used to set up an Economic Corridor Program list of STAA truck route improvements under SJCOG's RTIF development fee capital project list.
- B. Purpose: To prepare goods movement-related technical studies and analysis; to develop and compile related information and data; to coordinate related Goods Movement issues with local agencies, adjacent regions, and the private sector; staff support to the San Joaquin Goods Movement Task Force; to develop preliminary plans and funding strategies for goods movement improvements; to increase the visibility of goods movement Issues at the policy and technical levels and to the public.
- C. Tasks – unless otherwise noted, tasks in this work element will be delivered by SJCOG staff without outside consultant services:
1. Identify operational gaps in the existing STAA Truck Routes system and propose solutions.
  2. Participate in the Interregional Goods Movement Technical Working Group with Valley MPO Partners on Inter-Regional Goods Movement.
  3. Act as liaison with Goods Movement industry and the business community concerned with goods movement issues.
  4. Monitor and report on Trade Corridor and infrastructure projects.
  5. Review proposed new development to ensure adequate future STAA access where it is needed.
  6. Continued coordination with San Joaquin Valley MPOs in the development of a regional goods movement strategy to inform next transportation reauthorization bill or related legislative efforts.
  7. Develop strategic planning tasks for implementing a network of San Joaquin Valley inland port projects.
- D. Products & Schedule – unless otherwise noted, all work products under this work elements will be delivered by SJCOG staff without outside consultant services:
1. San Joaquin Goods Movement Task Force, agendas, meetings, and follow-up actions— Meet as needed through June 2026.

2. Meetings and correspondence to continue relationship with Northern California Trade Corridor Coalition – Operational Activities with deliverables reported on quarterly basis through June 2026.
3. Correspondence and technical memorandum proposing solutions to operational gaps on the STAA system – Operational Activities with deliverables reported on quarterly basis through June 2026 (in coordination with Truck Route Study in WE 601.02).
4. Document strategies for STAA truck access and routing Issues – Operational Activities with deliverables reported on quarterly basis through June 2026 (in coordination with Truck Route Study in WE 601.02).
5. Communications to Increase and broaden relationships with private sector to partner on goods movement issues—Operational Activities with deliverables reported on quarterly basis through June 2026.
6. Meetings and correspondence to coordinate policies, strategies, and projects in the San Joaquin Valley affecting goods movement, as needed through June 2026.
7. Document strategies for implementation of San Joaquin Valley inland port concept through June 2026.

E. Funding Sources:

Local Transportation Authority MK- COG      \$78,881.00

F. Responsible Agency:

SJCOG:  
\$78,881.00

G. Staff Required: (person-months)

SJCOG:  
2.0

## **701.01 ONGOING TECHNICAL ASSISTANCE**

- A. Previous Work: SJCOG provides considerable technical assistance of varied types to its member governments, including staff training in air quality, transit planning, transportation planning, and grant writing; One Voice® activities; and assistance working with monitoring agencies, on transportation grant applications and in resolving CTC fund vote issues for multiple agencies. During FY 20/21 SJCOG was added to the grant as a sub-grantee and entered into an agreement to provide project and grant management assistance to the City of Lodi to help deliver the Lodi Greenline Feasibility Study, a competitive Sustainable Transportation Planning grant awarded to Lodi in the FY 19/20 SB1 funding cycle. The project was successfully delivered in FY 21/22. During FY 2023/24 SJCOG established an on-call list for grant writing assistance for both SJCOG staff and SJCOG's member jurisdictions. During this previous fiscal year, SJCOG staff have also facilitated several grant applications in collaboration with local jurisdictions, as well as the San Joaquin Regional Rail Commission.
- B. Purpose: To provide assistance to SJCOG'S member governments to aid them in their planning programs as well as provide them with cost savings.
- C. Tasks: The following tasks could conceivably be requested of SJCOG but are not the full range of activities that can be provided.
1. Generation, procurement, and dissemination of data needed by member agencies in preparing grant applications, developing specific studies, or local projects.
  2. Grant preparation assistance by securing information on various grant programs, developing technical analyses, or preparing, submitting, and following up on grant review and progress.
  3. Staff training, and assistance with, local agencies in meeting federal transportation planning and project delivery requirements. This includes holding workshops and briefing sessions.
  4. Legislative assistance to include securing information on various pieces of legislation appearing before legislative committees or working with legislators in preparing and developing specific pieces of legislation that would benefit member agencies outside of direct lobbying activities.
  5. Provide information to State and Federal agencies on transportation policy issues; monitor, evaluate and comment on State and Federal legislation on regionally important transportation issues.
- D. Products & Schedule:

This is a technical assistance task without specified deliverables. Assistance requests and products provided will be tracked and reported quarterly through June 2026.

E. Funding Sources:  
Local Transportation Authority MK- COG      \$76,512.00  
Local Transportation Fund                      \$313,812.00

F. Responsible Agency:  
SJCOG  
\$390,324.00

G. Staff Required: (person-months)  
SJCOG  
3.0

## **801.01 INTERGOVERNMENTAL COORDINATION**

- A. Previous Work: This is the traditional heart of SJCOG's functions i.e., to coordinate planning functions with those of other jurisdictions. SJCOG has participated on a regular basis in the meetings of the California Committee of Regional Council Directors, Valley COG Directors, Regional Policy Council, Regional Transportation Planning Agencies group, California Transportation Commission, and California Council of Governments. SJCOG is consistently called upon to coordinate functions, and to explore new issues and techniques with agencies such as Caltrans, neighboring COGs, and organizations with an interest in transportation such as Human Services and Federal funding agencies. Coordination with local jurisdictions on plans that have a great impact on transportation such as General Plans and Air Quality plans are essential to the success of our planning efforts. SJCOG coordinates the Washington, DC San Joaquin One Voice® to educate legislators and key administration officials about the activities of this region and the transportation needs and priorities of the area.
- B. Purpose: To assure that all regional activities of SJCOG are fully coordinated with those activities which relate to one another in the area surrounding San Joaquin County or are of mutual concern to other COGs in the area or the State. SJCOG will promote the interests of San Joaquin County through the retention of a Washington D.C. consultant.
- C. Tasks:
1. SJCOG will work with the Federal Highway Administration, Federal Transit Administration, Environmental Protection Agency, Caltrans, and other state and federal agencies in implementing the planning process.
  2. SJCOG will regularly attend the COG Director's Association and Regional Transportation Planning Agency meetings and participate in the efforts of the California Council of Governments (*funded with LTF and not CPG*).
  3. Serve as a member of the Capitol Valley Service Authority for Freeway Emergencies Organization.
  4. SJCOG will participate with regional agencies throughout Federal Region IX, on issues of joint concern and benefit. Coordinate with local, state, and national associations of managers, planners, and others.
  5. Coordinate with Valley COG Directors and the San Joaquin Valley Air Pollution Control District Board.
  6. Retain Washington, DC-based legislative consultant (with non-state and federal funds). This task does not utilize state or federal planning funds and is accounted for separately.
  7. Participate in San Joaquin Valley One Voice® Analysis and Program. (*funded with LTF and not CPG*).
  8. Provide staff support, agenda items, and staff reports for the San Joaquin Valley Regional Policy Council. Share funding with valley MPOs for administrative support to operate the Policy Council. Attend San Joaquin Policy Council meetings quarterly.
  9. Participate in the San Joaquin Valley Legislative Advisory Committee,

- including weekly/monthly meetings.
10. Participate in and support the activities of the Partnership for the San Joaquin Valley and other pertinent state agency meetings as needed to support SJCOG's planning and project delivery programs.

D. Product & Schedule – unless specifically noted, work products are delivered by SJCOG staff without outside consultant assistance.

1. Correspondence with the Federal Highway Administration, Federal Transit Administration, Environmental Protection Agency, Caltrans, and other state and federal agencies in implementing the planning process – Operational activities with deliverables reported on quarterly basis through June 2026.
2. Meeting attendance in the San Joaquin Regional Policy Council, participate in San Joaquin COG Directors' Association and Regional Transportation Planning Agency, and monthly and participate in the efforts of the California Council of Governments (*funded with LTF and not CPG*) – Periodically, operational activities with deliverables reported on quarterly basis through June 2026.
3. Meeting attendance for the COG Director's Association and Regional Transportation Planning Agency meetings and participation in the efforts of the California Council of Governments – Monthly through June 2026.
4. Meeting attendance and written communications with Association of Bay Area Governments, Metropolitan Transportation Commission, Sacramento Area Council of Governments, and other Bay Area and mountain agencies on regional growth issues- to include coordination on assumptions for projections and forecasts (population, housing, jobs, and commuting) further identified in work element 801.02 - Operational activities with deliverables reported on quarterly basis through June 2026.
5. Meeting attendance to participate in the Capitol Valley Service Authority for Freeway Emergencies Organization – Quarterly meetings and reports.
6. Meeting attendance to participate with regional agencies throughout Federal Region IX, on issues of joint concern and benefit— Correspondence occurs through e-mail, phone, or meetings every two weeks on issues of joint concern. Operational activities with deliverables reported on quarterly basis through June 2026.
7. Meeting attendance and communication to coordinate with local, state, and national associations of managers, planners, and others - Operational activities with deliverables reported on quarterly basis through June 2026.
8. Work products per contract with Washington legislative consultant (with non-state & federal funds) – Annual activity delivered with outside consultant services through June 2026.
9. Work program of the San Joaquin Valley Policy Council – Operational Activities with Deliverables Reported on Quarterly Basis.
10. San Joaquin One Voice® Legislative Analysis and Legislative Program (*funded with LTF and not CPG*) – this activity is delivered with outside consultant assistance. January 2026.
11. Meeting attendance for San Joaquin Valley Regional Policy Council

- 12. meetings – quarterly.
- 13. Meeting attendance for the San Joaquin Valley Board and Transportation Workgroup – Operational activities with deliverables reported on quarterly basis through June 2026.

E. Funding Sources:

Local Transportation Funds (COG) -	\$257,579.00
Local Transportation Funds (CON) -	\$150,000.00
Fees	\$18,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANTS</u>
\$275,579.00	\$150,000.00

G. Staff Required: (person-months)

SJCOG  
13.0

## **801.02 PROJECTIONS AND FORECASTS**

A. Previous Work: In 1989, SJCOG began functioning as an affiliate data center within the California State Data Center Program. Among the joint objectives of the program are to expand the utility of Census Bureau data and to improve access to Census Bureau statistical resources. In this capacity, SJCOG is required to assist in the analysis of and dissemination of U.S. Census reports to member agencies and the general public. In order to make projections and forecasts, SJCOG maintains an extensive database with census information, employment, housing, and population projections. Beginning in FY 07-08 SJCOG entered into a new relationship with the University of the Pacific (UOP) - Center for Business and Policy Research (CBPR) to jointly produce materials related to Census research and forecasting. This relationship has continued and expanded over the intervening years and will continue to expand in the coming fiscal year. In previous years, major efforts under this work element have included a variety of Census Bureau staff led training sessions in conjunction with the Data Co-op, and San Joaquin Public Health Services. Population, household, and jobs forecasts for San Joaquin County are completed on a periodic basis in collaboration with CBPR. A new set of forecasts for San Joaquin County was completed during FY 2024-24 for use in the 2026 RTP/SCS effort. These forecasts are also used in support of SJCOG's other internal planning functions.

In 2017, SJCOG began a speaker series program (also with the UOP-CBPR), These speaker events are held quarterly and feature robust discussions on regional issues in San Joaquin County and will continue during the FY 25/26 fiscal year. Previous topics have included:

- Regional Housing Affordability
- Healthy Communities
- Jobs & Economy (including the Economic Impacts of the Regional Transportation Plan).
- Emerging Transportation Technology
- Workforce Development
- Innovation in Housing Construction & Construction Jobs
- Co-sponsorship of the annual State of the Northern San Joaquin Valley conference.
- Effects of Covid-19 on San Joaquin County Residents Journey to Work
- Cost of Living Index

B. Purpose: To provide demographic, economic, and transportation data for internal modeling and analysis, and to provide a service to local governments, stakeholder groups, and the general public. This element identifies regional needs for a greater understanding of the social and economic forces shaping our area of California. This work element is responsive to the need for socio-economic data within the entire work program. The Census Data Center function is responsive to questions from the community, to assist other agencies with data needs, and as input to regional policymakers. Forecasting is a tool to help policymakers reach informed decisions through careful analysis of socio-economic trends.

C. Tasks: SJCOG will partner with the UOP - CBPR to provide the following:

1. Develop workshops/seminars/brown bag meetings intended to educate businesses, schools, and other public agencies on the variety of data available and its uses.
2. Using the most recent information available, create analytical reports, charts, and summaries for SJCOG's "regional indicators" webpage.
3. Develop maps to visually display the characteristics of data products.
4. Updates to county-level population, housing, households, and jobs forecasts.
5. Answer census inquiries and provide special reports and presentations.
6. Participate as requested by Census Bureau in small support projects and information sharing.
7. Economic analysis and modeling activities related to various SJCOG planning efforts (e.g., Regional Transportation Plan update, socio-economic modeling).

D. Products & Schedule:

1. Produce Census and other research Information – Operational activities with deliverables reported on quarterly basis through June 2026.
2. Analysis and dissemination of FHWA Census Transportation Planning Products (CTPP) and other Census-related data through multiple dissemination channels (website, social media, special publications, and presentations) - Operational activities with deliverables reported on quarterly basis through June 2026.
3. Provide research and forecasting for special projects, events, and presentations – As required with deliverables reported on a quarterly basis through June 2026.
4. Maintain data on website for information dissemination – Operational activities with deliverables reported on quarterly basis through June 2026.
5. Coordinate and facilitate demographic forums/workshops – Quarterly (or as needed) through June 2026.

E. Funding Source:

Local Transportation Fund	\$260,696.82
Local Transportation Funds – CON	\$75,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$260,696.82	\$75,000.00

G. Staff Required: (person months)

<u>SJCOG</u>
2.0

### **801.03 AVIATION AND AIRPORT LAND USE PLANNING**

- A. Previous Work: The most recent Airport Land Use Compatibility Plan (ALUCP) for the Stockton Metropolitan Airport was adopted in 2016. The San Joaquin County ALUCP was adopted in 2009 and included all other public access airports in the county. An administrative update of both ALUCP's was completed in early 2018. The fee structure was comprehensively updated in May 2019. Based on the ALUCP, SJCOG reviews and comments on planning and development proposals that fall within an airport's areas of influence.
- B. Purpose: To undertake all functions necessary to serve as the Airport Land Use Commission for San Joaquin County, as required by the State Aeronautics Act. To protect the safe and efficient operation of public use airports from conflicting land uses within the airports' spheres of influence. To coordinate closely with State and other Regional Transportation Planning Agencies in implementing the California Aviation System Plan.
- C. Tasks:
1. As the Airport Land Use Commission, SJCOG will evaluate General Plan, zoning, and Airport Master Plan amendments and updates, as well as development proposals within the Airport Area of Influence for consistency with the ALUCP.
  2. Coordinating the transportation planning process with member agencies and airport operators regarding maintaining consistency with the ALUCP.
  3. Complete assessment of ALUC implementation practices and update the fee program as necessary.
  4. Participate in and further the development of the California Airport Land Use Consortium (Cal-ALUC)
- D. Products & Schedule – all products under this work element will be delivered by SJCOG without the assistance of outside consultants:
1. Consistency determination letters for land use land-use development applications referred to the ALUC. As required through June 2026.
  2. Correspondence with airport operators to determine if any Airport Master or Layout Plan updates, requiring amendments to the ALUCP, have been proposed or approved – Quarterly through June 2026.
  3. Documentation of coordination efforts for the transportation planning process with airport operators regarding access to their operational data during updates of transportation planning and programming documents such as FTIP, STIP, RTP, and RCMP. Such coordination includes a discussion of the condition of access roads to the airports and any maintenance or repair issues. -Quarterly through June 2026.
  4. Produce an annual report of ALUC operations, including applications reviewed, fees collected, and expenses for SJCOG Board review. September/October 2025.
  5. Produce annual fee adjustment analysis and report the findings to the SJCOG Board for review and approval – May 2026.

E. Funding Sources:

Fee Revenue \$60,000.00

F. Responsible Agency:

SJCOG  
\$60,000.00

G. Staff Required: (person-months)

SJCOG  
2.0

## **801.04 CONGESTION MANAGEMENT PROCESS**

- A. Previous Work: AB 471 (1989) provides for voluntary development of state Congestion Management Programs (CMPs) for all urbanized counties in California. The Measure K Renewal Program Ordinance, approved in November 2006, includes goals and provisions for an update of the CMP and a process to review and comment on local plans and development proposals. The FAST Act requires the establishment of a Federal Congestion Management Process. During FY 17/18, SJCOG adopted a revised Regional Congestion Management Plan and developed and used the Federal Congestion Management Process as a component of the RTP/SCS updates. During FY 19/20, SJCOG Board passed Resolution R-20-16 to “Opt Out” of the State CMP. During FY 20/21, SJCOG received enough support, via City Council-approved resolutions, to “Opt Out” of State CMP. The State CMP statutes, including goals set forth by the current Measure K Renewal Program Ordinance, will no longer be applicable. SJCOG is updating the RCMP to abide by Federal Congestion Management Process requirements. Also, SJCOG continues to implement Senate Bill (SB) 743, which changes recommended performance metrics from the level of service (LOS) to vehicle miles traveled (VMT).
- B. Purpose: To implement the requirements of the Federal Congestion Management Process. To consider introducing new performance measure(s) and/or information from a future Steering Committee. To implement a technically sound and achievable set of planning methods that monitor the transportation system. To demonstrate that all reasonable Transportation Demand Management (TDM) and Transportation System Management strategies have been employed to reduce VMT along regional roadways and highways.
- C. Tasks:
1. Follow a Congestion Management Process that addresses all suggestions and/or recommendations made as part of the federal certification review process and ensure continued compliance with FHWA policy and guidance. In reference to 23 CFR 450.320 (6) (d) and (e). In addition, a CMP process may include suggestions from a future Steering Committee.
  2. Planning activities to demonstrate and ensure that all reasonable Transportation Demand Management (TDM) strategies have been employed to reduce VMT along regional roadways and highways.
  3. Collect data on CMP network and monitor system.
  4. Use of CMP process to identify transportation projects and programs that can be considered for inclusion in the next RTP.
  5. Continue to define and expand upon CMP’s performance measures and indicators.

6. Continue to refine and develop applications for SJCOG's use of the Federal Congestion Management Process and procedures as a component of the CMP update. Adhering to the Federal Congestion Management process, investigate and apply corridor-level monitoring analysis to evaluate CMP system performance.
7. Establish policies and framework that abides by SB 743, as deemed necessary.
8. Research SB 743-related case studies & lawsuits, as deemed necessary.
9. Continue holding SB 743 working group, as deemed necessary.

D. Products & Schedule:

- Technical memoranda or correspondence related to application of regional and roadway-specific Transportation Demand Management strategies, as deemed necessary throughout the year through June 2026.
- Document requests and responses from each SB 743 working group meeting – As deemed necessary throughout year through June 2026.
- Technical memoranda or correspondence related to Federal Congestion Management process and procedures as part of the CMP update – June 2026.

E. Funding Source:

Local Transportation Authority-MK - COG     \$138,565.00

F. Responsible Agency:

SJCOG  
\$138,565.00

G. Staff Required: (person-months)

SJCOG  
2.0

## **801.05 REGIONAL PLANNING**

- A. Previous Work: This work element is based on the “3Cs” in federal transportation law: continuing, cooperative and comprehensive. All modes of transportation, including pedestrian walkways and bicycle transportation facilities, among others, shall be considered [23 United States Code (USC), Section 134 and Title 49, USC, Section 3004]. Regional transportation planning involves forming collaborative relationships with stakeholders in the development of a shared mobility vision, including improving the transition among modes in the multi-modal transportation system and incorporation of new transportation technologies. Increasingly, this work element has also supported SB375 implementation through regional housing initiatives to further housing production, affordable housing, and infill development, as well as emerging adaptation and regional resiliency efforts. Other previous work efforts include:
- Established new process requirements and work plan to complete first RHNA update cycle under SB 375, SB 575, and new State RTP Guidelines (done in conjunction with related work in work element 601.01 and, in FY 21/22, new work element 1350.01 – a standalone work element for the state housing funding in the Regional Early Action Program or REAP). The 2023-2031 RHNA plan was adopted by the SJCOG Board in August 2022 and approved by HCD in September 2022. The process of developing the RHNA plan began in FY21/22, with technical assistance from University of the Pacific Center for Business and Policy Research. With the incorporation of Mountain House during FY 24/25, a RHNA transfer negotiation and technical adjustment process was initiated for FY24/25 completion. The 2022 RHNA process and subsequent RHNA effort was primarily funded in work element FY 1350.01 since FY22/23.
  - Ongoing engagement and coordination with other local and regional planning professionals through valley-wide initiatives. During FY 18-19, SJCOG began extensive work with local planning efforts and initiatives, including facilitation of the Neighborhood Transformation working group of the South Stockton Promise Zone initiative and participation in the Stockton Mayor’s Taskforce for Affordable and Workforce Housing. More recent initiatives include the Stockton Climate Action Plan Advisory Committee, Healthy Neighborhoods Collaborative, Community Health Needs Assessment Steering Committee, Enterprise TOD Advisory Group, Workforce Backbone Working Group, North Valley Thrive CERF meetings, and AB 617 Stockton Steering Committee. This work continued in FY24/25.
  - Monitored and remained informed of legislation and new requirements for member agency General Plan Housing Elements and the RHNA process; disseminated pertinent information to member agencies, SJCOG standing committees, and the SJCOG Board.
- B. Purpose: SJCOG recognizes that a well-informed decision-making process is critical in regional planning. To that end, this work element is to inform, report, and educate traditional governmental stakeholders/partners, general public, and

private sector on developing planning issues and policies or legislation that may affect the transportation planning and implementation process. This work element focuses on regionally significant planning efforts and collaborative relationships with traditional and non-traditional stakeholders. It represents a coordinated work effort to identify and explore emerging planning issues and policies not explored in other work elements. This is done through meetings, presentations, phone conferences, and research/report development.

C. Tasks:

1. Coordinate with and assist local partner efforts in applying for grants through Federal, State, or non-profit programs to assist in smart growth, infill, or active transportation projects. Included is research on grant opportunities and dissemination of this information to various interest groups.
2. Examination of local general plans, updates of general plans, and specifically, housing and circulation elements with reports on potential relevance and impact to San Joaquin County region.
3. Monitor legislation and new technical requirements for affordable housing provision in member jurisdictions' Housing Elements and provide regular updates to SJCOG Board, standing committees, and jurisdictional staff.
4. Sponsor technical workshops on regional planning and transportation and/or speak at workshops led by other agencies on these topics.
5. Through outreach efforts to traditionally under-represented and under-served populations such as the elderly, disabled, low-income, and minority (i.e., Black, Hispanic, Asian American, American Indian/Alaskan Native, and Pacific Islander) community groups and their leaders, identify regional planning topics and create materials to disperse information specific to those audiences.
6. Engage and participate with San Joaquin County Public Health and various public environmental and health stakeholder groups to promote integration of public health concerns in the transportation planning process and produce information for dissemination on the relationship between public health and regional planning.
7. Research and write issues papers on emerging planning issues (i.e., electric vehicles, driverless cars, impacts to regional transportation planning).
8. Participate and collaborate with partners on efforts to examine planning tools to improve regional planning analysis.
  - Planning Tool - Housing Connect Tool: An interactive web application that:
  - Presents environmental, socio-economic, and parcel-specific data.
  - Visualizes housing development details, including applications, construction, entitlements, permits, and completed units. This includes survey forms and summary reporting for residential projects.
  - Tracks Regional Housing Needs Allocation (RHNA).
  - Displays historical development trends using APR data.

- Provides insights into the status of housing element programs.
- Ongoing maintenance and training.
- Project management and meetings

D. Products & Schedule:

1. Correspondence related to assistance to local partners with planning grants – As Needed, Deliverables will be reported on a quarterly basis through June 2026.
2. Streamlining of the Housing Element APR reporting. Continue to support maintenance, gather GIS data, and customize Housing Connect tool for SJCOG local jurisdictions. (through June 2026)
3. Regional planning materials to disseminate and document outreach efforts and meetings with traditionally under-represented and under-served populations and their community leaders-Operational activities with deliverables reported on quarterly basis through June 2026.
4. White papers or issues papers or staff reports on various regional planning/policy topics, involving stakeholders in development and issues identification – Operational activities with deliverables reported on quarterly basis through June 2026.
5. Written public outreach information disseminated on various regional planning topics – Operational activities with deliverables reported on quarterly basis through June 2026.
6. Meeting attendance in forums, meetings that examine land use tools or other planning tools--Operational activities with deliverables reported on quarterly basis through June 2026.

E. Funding Sources:

Local Transportation Authority – COG	\$133,219.00
Fees/Interest	\$5,000.00

F. Responsible Agency:

SJCOG  
\$138,219.00

G. Staff Required: (person-months)

SJCOG  
2.0

## **801.06 VALLEY METROPOLITAN PLANNING ORGANIZATION COORDINATION**

- A. Previous Work: The Valley COGs joined forces to undertake specific activities relating to transportation planning, programming, and air quality. Coordination between Stanislaus Area Association of Governments, Merced County Association of Governments, Kern Council of Governments, the Council of Fresno County Governments, Kings County Association of Governments, Tulare County Association of Governments, and Madera Association of Governments has been ongoing for years. This coordination with other Valley MPOs and the San Joaquin Valley Unified Air Pollution Control District (SJVUAPCD) includes specific roles and responsibilities as described in a Memorandum of Understanding.
- B. Purpose: The need for Valleywide coordination became apparent through the requirements of the Federal Clean Air Act Amendments and California's Clean Air Act. As a result, the Valley Metropolitan Planning Organizations develop future work items in tandem and sharing responsibilities for covering statewide and Valleywide issues on a coordinated basis.
- C. Tasks:
1. Coordinate emissions modeling for air quality conformity Valley-wide issues.
  2. Participate in Valley Transportation Control Measures Implementation.
  3. Participate in Valley Interagency Consultation Committee
  4. Participate in Statewide air quality conformity committee on an as needed basis.
  5. Coordinate the Valley MPOs on SB 375 Implementation.
  6. Participate in peer-to-peer review of Valley FTIP products.
  7. Manage the consultant contract for meeting preparation and facilitation for San Joaquin Valley Director Meetings – this task is completed with contracted consultant assistance –Monthly
- D. Products & Schedule:
1. Documentation related to Valleywide Transportation/Air Quality Modeling Revision Process – Operational Activities with Deliverables Reported on Quarterly Basis (through June 2026).
  2. Meeting attendance and documented agendas of Valleywide Interagency Coordination Committee – Monthly (through June 2026).
  3. Valleywide Transportation Control Measure Implementation – Operational Activities with Deliverables Reported on Quarterly Basis (through June 2026).
  4. Meeting attendance and documented agendas of Valleywide Model Coordinating Committee – Monthly (through June 2026).
  5. Meeting attendance and documented agendas of Valley MPO Regional Planning Committee – Monthly (through June 2026).
  6. Written communication or correspondence documenting peer –to--peer FTIP reviews – as needed (through June 2026).
  7. Meeting attendance and documented agendas of Valley MPO SB 375

Implementation Committee – Monthly (through June 2026).

8. Meeting attendance and documented agendas of Director’s Meeting-  
Monthly (through June 2026)

E. Funding Sources:

Local Transportation Funds - COG	\$134,211.00
Local Transportation Funds - Consultant	\$45,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>CONSULTANT</u>
\$134,211.00	\$45,000.00

G. Staff Required: (person-months)

SJCOG  
10.0

## **801.09 HABITAT PLAN IMPLEMENTATION**

- A. Previous Work: The purpose of this work element is to implement the San Joaquin County Multispecies Habitat Plan. The work element has concentrated on the issue of habitat preservation, protection of open space, and management for threatened and endangered species protection. The habitat plan has acquired approximately 24,285 acres in easements.
- B. Purpose: As economic growth and species protection seek to find compatible ground, SJCOG steps in to develop a process that maximizes the best interests of both. Investments such as major public roadways must not deteriorate species' habitat. Since 2001, SJCOG has been implementing a predictable, financially fair, and effective Habitat Management Plan for the entire County of San Joaquin. In this manner, the program will be able to meet all applicable State and Federal laws and assist to meet Environmental Protection Agency Section 404 requirements.
- C. Tasks:
1. To support implementation of the Habitat Management Plan for the entire region.
- D. Products & Schedule:
1. Regional Habitat Management Plan Implementation –Operational activities with deliverables reported on quarterly basis through June 2026.
- E. Funding Sources:  
SJCOG (Developer Fees) - \$700,000.00
- F. Responsible Agency:  
SJCOG  
\$700,000.00
- G. Staff Required: (person-months)  
SJCOG  
2.0

## **901.01 IMPLEMENTING MEASURE K RESPONSIBILITIES**

- A. Previous Work: The original Measure K was passed by San Joaquin County voters in 1990 for a 20-year term. The Measure K Expenditure Plan identifies the countywide transportation facility and service improvements, including highway, public transit, railroad grade crossing, passenger rail, and bicycle projects, to be delivered by a 1/2-cent sales tax in San Joaquin County dedicated for transportation purposes. The Expenditure Plan specifically defines the categorical allocations of the sales tax revenues by transportation mode or facility and identifies the individual projects and programs to be funded under each category.

In November 2006, the voters of San Joaquin County approved the renewal of the Measure K program, which expired in 2011. With the renewal, Measure K was extended for an additional 30 years through 2041. In 2020, SJCOG adopted an updated Strategic Plan for the Measure K Renewal that served as the basis for Measure K funds to be disbursed for specific projects identified in the Measure K Renewal Expenditure Plan, including the timing of disbursements of those funds, and the proportionate share or absolute value of the Measure K contribution to each project.

- B. Purpose: The implementation of Measure K (including the Measure K Renewal Program) is a direct mandate of the people of San Joaquin County to improve the quality of life through improving the transportation system in the County. The intent of the Measure K program includes leveraging other state and federal funds to deliver Measure K projects. The purpose of implementing Measure K responsibilities, therefore, includes securing other state and federal funds that can be leveraged with Measure K funds.

- C. Tasks:

1. Amendments as needed to the Measure K Renewal Strategic Plan.
2. Implement the integrated Measure K and Measure K Renewal Financial Plan.
3. Close out the Measure K Renewal Early Action Program.
4. Measure K Ordinance and Expenditure Plan annual amendment process.
5. Provide Project Sponsor assistance.
6. Perform program administration.
7. Pursue opportunities to leverage state and federal funds.
8. Review Measure K and Measure K Renewal Revenue Estimates.
9. Monitor Measure K project delivery, fund disbursements, and prepare periodic reports to committees and Board.

- D. Products & Schedule – all work products are delivered by SJCOG staff without assistance from contracted consultant services:

1. Implement and monitor existing Strategic Plan – Continuous Review of Operational activities and Deliverables through June 2026.
2. Integrated Measure K and Measure K Renewal Financial Plan – Continuous Review of Operational Activities and Deliverables through June

- 2026.
3. Amend Measure K Ordinance and Expenditure Plan – June 2026.
  4. Meetings and correspondence for Project Sponsor Assistance – Continuous Review of Operational Activities and Deliverables through June 2026.
  5. Program Administration – Continuous Review of Operational Activities and Deliverables through June 2026.
  6. Communications and technical documents related to Leveraging state and federal funds – Continuous Review of Operational Activities and Deliverables through June 2026.
  7. Measure K financial status report – June 2026.
  8. Written communication and reporting for Project Delivery Monitoring –Periodic reports to the Board through June 2026.
  9. Managing agency investments through June 2026

E. Funding Sources:

Local Transportation Authority-MK (COG) -	\$403,305.00
Local Transportation Authority-MK (PM) -	\$85,000.00
Fees	\$25,500.00

F. Responsible Agency:

SJCOG  
\$513,805.00

G. Staff Required: (person-months)

SJCOG  
19.0

**901.02 REGIONAL TRANSPORTATION IMPACT FEE (RTIF)**

A. Previous Work: A regional fee that can be equitably and comprehensively applied to fund regional projects was adopted by the SJCOG Board in 2005. SJCOG is responsible for implementing, administering, and monitoring the RTIF program. All jurisdictions adopted the program, which was in full implementation by July 1, 2006. SJCOG now administers the program. During FY 2012 and 2017, and 2024 5-year updates of the RTIF program were conducted in accordance with the Mitigation Fee Act and were adopted by the SJCOG Board. These updates will now occur every eight years, owing to recent legislative changes.

An annual report is prepared and delivered at the end of each fiscal year and an annual RTIF fee adjustment analysis is conducted each year in May for implementation by local jurisdictions at the beginning of each fiscal year.

B. Purpose: To levy a fee to mitigate the impacts of new development on the regional roadway system based on a legal nexus. The RTIF program generates funding for capital expenses for the portion of transportation project costs of regionally significant transportation projects that are attributable to the impacts of future land use development.

C. Tasks:

1. Administer RTIF Program. Receive reports from member jurisdictions on collection of fees. Prepare annual reports. Account for use of RTIF funds for designated regionally significant projects.
2. Continue to provide training and assistance to partner agency staff (e.g., individual meetings/consultations, workshops, guidance manual).
3. Respond to local jurisdictions and provide technical assistance to administer the RTIF.
4. Conduct annual audits and account for third-party costs.

D. Products & Schedule:

1. Administer the RTIF program and complete all reporting requirements – Quarterly through June 2026.
2. Annual RTIF Report to SJCOG Board – October 2025.
3. Documentation of meetings, training, and assistance to partner agency staff - As required through June 2026.
4. Administer an on-call consultant contract to assist with any required project list updates or other technical work needed for program implementation – As required through June 2026.

E. Funding Sources:

Local Transportation Authority–MK COG	\$3,879.00
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Regional Transportation Impact Fee-	\$35,000.00
Local Transportation Authority PM	\$34,336.00

F. Responsible Agency:  

<u>SJCOG</u>	<u>Consultant</u>
\$38,879.00	\$34,336.00

G. Staff Required: (person- months)  
SJCOG  
3.5

## **901.03 MEASURE K RENEWAL SMART GROWTH INCENTIVE PROGRAM**

- A. Previous Work: This program was established as part of the passage of the Measure K Renewal Program in November 2006. Program Policies were established as a part of the Measure K Renewal Strategic Plan. Specific Program procedures, financial program, and application process were adopted by the SJCOG Board. The first selection and allocation of Planning and Capital Projects occurred in FY 08-09. In 2012, SJCOG completed the Smart Growth and Transit-Oriented Master Plan for San Joaquin County to further guide investments of the Measure K Renewal Smart Growth Incentive Program. In October 2017, a call for Smart Growth projects was disseminated and projects were approved for funding by SJCOG Board in 2018 and 2024.
- B. Purpose: To establish project operational details and to implement the Measure K Renewal Growth Incentive Program. To receive proposals, select and prepare cooperative agreements to implement projects eligible for both the capital and planning components of the program. To evaluate and identify opportunities to improve the program on a continual basis. To prepare studies related to the SMART Growth Program.
- C. Tasks:
1. Tasks involve project management of Smart Growth-funded projects.
  2. Monitoring both development activities in the region, planning projects in the pipeline, and legislative/regulatory opportunities to advance Smart Growth in San Joaquin region.
  3. Participate in community or (state/federal) meetings, workshops, and conferences as it relates to Smart Growth and implications to San Joaquin County.
- D. Products and Schedule:
1. Provide project management, oversight, and monitoring of Measure K Renewal Smart Growth funded projects to ensure their project delivery is met– Operational Activities with deliverables reported on quarterly basis through June 2026.
  2. Research documentation on state and federal policies and implications to Smart Growth program - Operational Activities with deliverables reported on quarterly basis through June 2026.
- E. Funding Sources:  
Local Transportation Authority-MK –COG    \$37,581.00
- F. Responsible Agency:  
SJCOG  
\$37,581.00
- G. Staff Required: (person-months)  
SJCOG  
1.0

## **1001.01 SJCOG OVERALL WORK PROGRAM ADMINISTRATION**

- A. Previous Work: The administration of previous years' work programs includes hiring qualified staff and consultants, preparing, and submitting closing reports for last fiscal year and quarterly reports in current fiscal year, updating the DBE plan, reviewing and updating 3C self-certification, adopting Overall Work Program and Annual Financial Plan, updating and amending OWP and Annual Financial Plan.
- B. Purpose: To provide administrative guidance to implement, update, and develop SJCOG'S Overall Work Program and Annual Financial Plan.
- C. Tasks:

All tasks will be completed by SJCOG staff without assistance from outside consultants.

1. Attend the annual Statewide and Caltrans District 10 Coordination and Development OWP meeting.
2. Carry out administrative support and general staff supervision that is required for the implementation of the work program, such as timesheet preparation, etc.
3. Prepare and submit (at a minimum quarterly progress reports) and submit quarterly invoices to Caltrans.
4. Annually update SJCOG'S Disadvantaged Business Enterprise Plan and goals for the fiscal year.
5. Annually review and update SJCOG'S 3C Process Self Certification Evaluation.
6. Review and evaluate the core responsibilities of the Overall Work Program
7. Prepare, and adopt SJCOG'S Overall Work Program and budget in cooperation with member governments.
8. Develop and submit OWP Amendments as needed.
9. Develop and submit Request for Reimbursements (RFR's) to ensure expenditures are accurate, requested on a reimbursement basis, for eligible activities, for delivered products, and completed in accordance with work elements in the OWP and Federal and State Requirements.
10. Develop Draft and Final OWP for FY 2026/27.
11. Develop and submit FY 25/26 year-end package.

- D. Products & Schedule:

All work products will be delivered by SJCOG staff without assistance from outside consultants.

1. Implement Work Program - Operational Activities with deliverables reported on a quarterly basis through June 2026.
2. Quarterly reports and quarterly invoices – Quarterly through June 2026.
3. An updated Disadvantaged Business Enterprise Plan and goal statement for the next fiscal year - October 2025
4. Self-Certification Evaluation – March 2026

5. An adopted Overall Work Program for FY 2026/25 - March 2026
6. Amend and update Overall Work Program – OWP amendments vary but generally happen approximately three times a year.
7. Year-end package submittal (due August 2025 per Regional Planning Handbook)

E. Funding Sources:

Federal Highway Administration - PL      \$98,436.00 Toll Credits - 11,290.61

F. Responsible Agency:

SJCOG  
\$98,436.00

G. Staff Required: (person-months)

SJCOG  
10.0

## **1001.02 TRANSPORTATION DEVELOPMENT ACT**

- A. Previous Work: This task is an ongoing function and involves the administration of Transportation Development Act Funds (Senate Bill 325), as well as State Transit Assistance Funds (Senate Bill 620) received for San Joaquin County.
- B. Purpose: Senate Bill 325 and Assembly Bill 620 gave extensive responsibilities to the Regional Transportation Planning Agencies for administering these funds. Local governments depend upon these funds and the proper administration of them for the continued operation of transit services and the continued maintenance of their road and street systems.
- C. Tasks:
1. Prepare an estimate of funds needed to administer the Local Transportation Fund and State Transit Assistance funds by the County Auditor and staff.
  2. Develop apportionments for Local Transportation Fund funds in accordance with Statute.
  3. Update SJCOG'S Rules and Regulations for administering the Local Transportation and State Transit Assistance Funds as a result of changes that may occur from new legislation or policy changes.
  4. Hold public hearings and make required findings on "Unmet Transportation Needs" that are reasonable to meet.
  5. Process claims for Transportation Development Act funds: a) Review claims for compliance with statutes, regulations, and Regional Transportation Plan; b) Prepare staff reports and resolutions; c) Transmit allocation instructions to County Auditor consistent with section 6659 of the California Code of Regulations.
  6. Prepare Transportation Development Act Annual Report.
  7. Contract with an accounting firm to carry out in a timely fashion the annual financial and compliance audits (SJRTD: compliance audits only).
  8. Continue to maintain an in-house accounting of both Local Transportation Funds and State Transit Assistance Funds received and disbursed.
  9. SJCOG staff will continue to provide information to State agencies on Transportation Development Act policy issues and will continue to monitor, evaluate, and comment upon State legislation dealing with the Transportation Development Act.
  10. Work with state and other RTPAs to develop rules and administrative guidelines to respond to new state legislation.
  11. Utilize community-based organizations to bring more people, particularly the underserved and under-represented, into the planning process.
- D. Products & Schedule:
1. Local Transportation Fund and State Transit Assistance Revenue Estimates and Apportionments - February 2026
  2. Updated SJCOG LTF/STA Rules and Regulations - February 2025 Unmet

Transit Needs Findings - March 2026

3. Documented approval of Local Transportation Fund and State Transit Assistance Claims – Operational Activities with Deliverables Reported on Quarterly Basis through June 2026.
4. Local Transportation Fund and State Transit Assistance Annual Reports - October 2025.
5. Annual financial and compliance audits of Transportation Development Act claimants, except (SJRTD, Compliance only) - October 2025 to January 2026
6. Up-to-date Financial Statements showing status of Local Transportation Fund and State Transit Assistance Funds - Operational Activities with deliverables reported on quarterly basis through June 2026.
7. Utilize community-based organizations to bring more people, particularly the underserved and under-represented, into the Unmet Transit Needs process – through update completion in March 2026.

E. Funding Sources:

Local Transportation Fund - COG	\$368,209.17
Local Transportation Fund - Consultant Fees and Interest	\$60,000.00
Transportation Development Act	\$1,500.00
	\$290,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$659,709.17	\$60,000.00

- G. Staff Required: (person-months)  
SJCOG  
7.0

## **1001.03 COMMUNITY INVOLVEMENT PROGRAM**

- A. Previous Work: This work element has and continues to educate, inform and provide engagement opportunities for the public on various programs and projects. Methods have included the Measure K annual report, news releases, multilingual newspapers, and television media. Public input has been solicited through public hearings, community workshops, and presentations. SJCOG maintains an interactive website as well as social media sites, including Facebook, Instagram, Twitter, LinkedIn, and YouTube, and a free electronic subscription-based notification system to alert the public on news and contract opportunities. A directory of Native American groups in San Joaquin County has been developed and the SJCOG mailing list expanded to include names of individuals and groups identified in that effort. SJCOG hosts public information presentations every year, including public ceremonies for major project milestones.
- B. Purpose: To keep the general public aware of SJCOG and its planning functions, and to encourage their support and participation. To assure that all planning efforts are reflective of the needs and desires of the general populace within the County. To ensure early and continuous involvement of key Federal, State, and Local Resource Agencies and interest groups.

SJCOG'S efforts are to continue to ensure early involvement by the public, and Native American Tribal Governments - with a particular focus on underrepresented groups under Environmental Justice provisions. The California Valley Miwok Tribe is the only federally recognized Native American tribe in the SJCOG region. In San Joaquin specifically, they are considered a "landless" Tribe. Meaning, although they are federally recognized, they do not have land held in trust by the Bureau of Indian Affairs (i.e., no reservation or rancheria). Also, a critical effort is to ensure the early opportunity for resource agencies and other key environmental organizations to participate in development of the public outreach structure and to have an early and continuous opportunity for full involvement in all planning, programming, and project efforts. In accordance with Title VI and Environmental Justice guidelines, the work element supports all other work element projects in coordinating outreach efforts to all underrepresented and underserved populations.

The SJCOG public involvement process is designed to provide timely information about transportation issues and processes to citizens, key participating resource agencies and other public partnering agencies, transportation agency employees, private sector transportation providers, and others affected by transportation plans, programs, and projects.

### Overview

SJCOG uses a combination of committees, fully noticed public hearings, workshops, forums, surveys, publications, the Internet ([www.sjcog.org](http://www.sjcog.org)), public access television, early access to and consultation with resource agencies,

and focus groups to educate, inform, gauge and respond to regional issues and public questions and concerns. Stakeholders and interested individuals are involved through the SJCOG's committees, direct mail, public hearings, public workshops, social media, and early outreach and consultation. Documents are circulated monthly to the committees for review and comment. These committees include:

- The Technical Advisory Committee is comprised of staff from planning and public works departments, Caltrans, San Joaquin Regional Transit District, San Joaquin Regional Rail Commission, San Joaquin Valley Unified Air Pollution Control District, the Port of Stockton, and the Stockton Metropolitan Airport.
- The Social Service Transportation Advisory Committee is comprised of representatives of the elderly, disabled, and social services agencies that serve transit-dependent persons.
- The Citizens Advisory Committee, which is comprised of citizens appointed by the SJCOG Board, advises the Board on Measure K and other issues that come before SJCOG.
- Interagency Transit Committee, which is comprised of public transit agencies within the county.
- Goods Movement Task Force, which is comprised of local agencies, private sector rail, inter-modal and trucking businesses, and other private sector representatives.

Also, SJCOG's monthly board agendas, packets, and/or minutes are distributed to individuals, agencies, and organizations affected by transportation plans, programs, and projects. Among recipients: media representatives from English and Spanish language publications, non-profit organizations, private businesses, and local residents. SJCOG staff regularly reviews the mailing list to involve organizations that represent various segments of the general population, including ethnic, racial, elderly, disabled, and disadvantaged groups.

Services include:

- Conducting one-on-one interviews with residents and business owners.
- Organizing and administering public meetings and forums.
- Developing and organizing direct mail to community groups and residents, including ethnic, racial, elderly, disabled, and disadvantaged groups.
- Providing Translation Services
- Conducting community presentations
- And acting as project spokesperson to interact with the public, merchants, media, etc. to keep them informed about construction progress and to minimize impacts.

## Environmental Justice Efforts

SJCOG has made significant strides to take into account the needs of those traditionally underserved by transportation, such as low-income and minority households. SJCOG reaches low-income and minority populations through its Social

Services Technical Advisory Committee and its public outreach program which includes reporting on Board Actions, website news items, meeting agendas, and notices of public workshops and hearings. Through the San Joaquin Regional Transit District, Dial-a-Ride transit service is made available to disabled residents to attend SJCOG Board and other public meetings.

Other specific efforts include:

#### Translation Services

Informational materials such as RTP goals, policies, surveys, and overview materials, are translated into Spanish and other languages as needed. Notices and COG-related news stories regularly appear in Spanish language as well as English media.

#### Workshops

SJCOG regularly conducts public outreach workshops either in person or through online virtual methods in conjunction with numerous of its program and planning efforts. These include workshops for older, under-represented, or Spanish-speaking groups and organizations. Significant emphasis is dedicated to workshops during the development of the RTP/SCS.

#### Native American Outreach

SJCOG adopted a Tribal Outreach Process in FY 17/18. Within this process, SJCOG distributes information about its plans and projects to Native American communities, organizations, groups, and individuals. The adopted procedures can be found at:

<http://www.sjcog.org/PPP>.

#### Resource Agencies

SJCOG ensures key resource agencies are provided the opportunity to provide early input in the formation of planning studies, feasibility studies, and policy-related documents. SJCOG also provides early and continuous consultation with key stakeholder agencies.

#### Title VI Policy

SJCOG does not exclude anyone from participation in or deny the benefit of, or otherwise subject to discrimination on the basis of race, color, sex, national origin, or physical handicap, for any program. SJCOG publicizes its Title VI policy in its brochure, Board Actions, and on its website. When updating our master mailing list, SJCOG staff seeks out organizations that represent traditionally under-served groups in order to provide information on transportation plans and projects. Also, SJCOG maintains a formalized Title VI Complaint Procedure, in the event that a group or person believes they have been subjected to discrimination in our public involvement process.

C. Tasks:

General Community Involvement:

1. In-person or virtual presentations before civic clubs and other similar types of organizations. These presentations are either topic-specific or project specific, tied to federally funded projects, plans, or the RTP in which SJCOG is involved. (FHWA PL)
2. Issue news releases to the media related to FTIP and RTP (FHWA PL).
3. Update and offer a Public Officials Directory on an annual basis to assist local governments and the general public in locating and maintaining contact with their elected representatives.
4. Conduct and staff SJCOG'S appointed Citizens' Advisory Committee Meetings and discussion items related to RTP and FTIP (FHWA PL).
5. Prepare informational products on SJCOG activities that are directly tied to FTIP and RTP (FHWA PL).
6. Maintain website and social media accounts to provide access to the public related to information on FTIP, and RTP. (FHWA PL)
7. Provide Title VI support to all projects in the OWP and Measure K Strategic Plan. (FHWA PL)
8. Provide early consultation and continuous involvement of resource agencies in planning and feasibility studies. (FHWA PL)
9. Provide public involvement, including to targeted populations and organizations as part of development of plans and feasibility studies. Ensure outreach and communication plans for large studies that implement or are related to the FTIP and RTP. (FHWA PL)
10. Ensure usage of visualization techniques in all public outreach activities related to FTIP and RTP.

D. Products & Schedule:

1. Post news through LinkedIn, Facebook, Twitter, Instagram, YouTube, and Website (ongoing activity July 2025 to June 2026).
2. Material for public presentations – (ongoing activity July 2025 to June 2026 – materials developed based on project need).
3. Periodic news releases (ongoing activity July 2025 to June 2026 – materials developed based on project need).
4. Develop agenda and hold Citizens Advisory Committee (CAC) meetings on specific items related to RTP and FTIP– Monthly (through June 2026).
5. SJCOG materials specific to FTIP and RTP (as needed through June 2026).
6. Documented changes and written materials to maintain and update website, and social media platforms for FTIP and RTP items – (ongoing as needed from July 2025 to June 2026).
7. Meetings and communications related to implementation of outreach as noted in the purpose and tasks, and appropriate resource agencies for all planning and feasibility studies. (ongoing July 2025 to June 2026) (FHWA PL)

8. Enhance website with platform re-design, development of template designs and standards and update to adhere to DOJ ADA Ruling (July 2025)

E. Funding Sources:

FHWA PL

\$325,222.00 Toll Credits 37,302.96

Local Transportation Authority

\$312,387.00

F. Responsible Agency:

SJCOG

\$637,609.00

G. Staff Required: (person-months)

SJCOG

8.0

## **1101.01 TRANSPORTATION DEMAND MANAGEMENT (TDM) SERVICES**

- A. Previous/Ongoing Work: SJCOG employs several programs to reduce travel demand of single-occupancy vehicles. Established by SJCOG in 1983, dibs is a regional program that covers San Joaquin and Merced counties since 2010. The goal of the program is to encourage commuters to consider a shift to an alternative mode by promoting smart travel options such as carpooling, vanpooling, transit, biking, walking, and telecommuting. Various tools and services are provided to the community such as emergency ride home, transit information, park and ride facilities list, and vanpool subsidies. Outreach and marketing services are provided directly to employers and community organizations as well as the coordination of special events to increase engagement amongst all members of the community. Program staff also works with employers to implement San Joaquin Air Pollution Control District Rule 9410 which requires certain large employers to develop and implement an employee trip reduction program. The rule aims to reduce emissions and improve air quality in the region by encouraging alternative transportation modes and reducing vehicle miles traveled. For San Joaquin County specific, other TDM programs include, the Park and Ride Funding Program and Master Plan and the National Transit Database Vanpool Program. As a member of the Capitol Valley Regional-Service Authority for Freeways and Expressways (CVR-SAFE), SJCOG serves as the liaison to the Sacramento Area Council of Governments (SACOG) to administer the 511 Traveler Information System and SAFE program. TDM programs have various benefits for employers, commuters, economy, and environment. They can reduce parking demand and cost, enhance employee retention and recruitment, support corporate sustainability efforts, provide more options and convenience, protect from gas prices fluctuations, reduce personal transportation costs, promote healthy lifestyle, attract investment and development, improve access to community activity centers, reduce greenhouse gases, reduce congestion and potential for incidents, and reduce energy consumption.

SJCOG is also a member of the CalVans joint powers authority that includes 9 other MPO's to fund and operate the Vanpool and other public transportation programs to provide agricultural workers with safe, affordable vehicles to drive themselves and others to work. Staff attends monthly Board Meetings and project update meetings as needed to ensure enhanced collaboration and project participation in the region.

- B. Purpose: To improve the efficiency of existing transportation facilities, reduce congestion and improve air quality. To ensure members of the public are informed, educated, and are provided the tools and services necessary to make a change in behavior.
- C. Tasks:
1. Program Administration – Operations (After time limitation per CMAQ guidelines, projects are transferred to Measure K local funding.

2. Administer the Emergency Ride Home program
3. Manage vanpool program and coordinate with vanpool providers to collect and report vanpool data to the National Transit Database (NTD).
4. Manage contract with Merced County Association of Governments (MCAG).
5. Support efforts of the congestion management program as it relates to TDM.
6. Employer and Community Outreach
  - Contact employers to provide technical assistance in identifying appropriate TDM strategies for development of worksite TDM programs.
  - Conduct worksite transportation functions to promote rideshare services and encourage commute alternatives among employees. This may include commute surveys, work site analyses, events, and workshops.
  - Serve as a resource to employers subject to San Joaquin Valley Air Pollution Control District Trip Reduction Rule 9410.
  - Conduct presentations to employers and community organizations to promote and build awareness of program benefits and services.
  - Provide various reports on environmental and cost benefits, commute patterns, and commute activity to commuters and stakeholders.
  - Provide tools and services such as brochures, flyers, posters, preferred parking signs, ride matching system, Emergency Ride Home program, and other promotional material to the community.
  - Evaluate grant, sponsorship, and donation opportunities to enhance program incentives and events.
7. Marketing, Education/Research, and Promotions:
  - Educate residents on TDM programs available and promote carpooling, vanpooling, transit services, park-and-ride lots, and bicycle commuting.
  - Promote Emergency Ride Home program, develop marketing material for employers, outbound commuters, neighborhoods, residential developments, and business parks.
  - Provide engagement opportunities for community by developing interactive programs such as videos, training, and webinars.
  - Promote benefits, services, and updates through website, social media, electronic methods, direct mail, and special events.
  - Initiate stories, develop articles, and press releases, and respond to media requests.
  - Provide updates on trends, and news to commuters, employers, stakeholders, and general public.
  - Provide progress report to MCAG, and at least semi-annually or as mutually agreed upon by all parties.

- Attend annual Association for Commuter Transportation (ACT) conference.
- Participate in training and educational opportunities to enhance skills and knowledge in marketing and the TDM industry.
- Coordinate with Caltrans, other area MPOs, transit agencies, TDM agencies, San Joaquin Valley Air Pollution Control District, etc. regarding TDM strategies and operations to promote alternative transportation options.
- Educate employers on SJVAPCD Trip Reduction Rule 9410.
- From the recommended strategies from the TDM Study, develop and implement new TDM Strategies

8. SAFE/511 Travelers Information System:

- Work with Sacramento Area Council of Governments to establish a marketing plan to promote 511 and roadside assistance.
- Evaluate budget for San Joaquin County
- Maintain communication with San Joaquin County SAFE Board Members
- Attend SAFE Board Meetings
- Participate in statewide CalSAFE and Motorist Aid group and annual conferences.
- Execute funding transfer agreement with Sacramento Area Council of Governments (SACOG) for TDM funding
- Launch new trip planning system in partnership with SACOG

D. Products & Schedule:

1. Monthly NTD Reports (July 2025 – June 2026)
2. Annual NTD and Audit Report (October 2025)
3. News e-blasts, and social media posts (monthly through June 2026)
4. Participation in Association for Commuter Transportation (ACT) Conference (July/August 2025)
5. Videos, webinars, and training – quarterly through (June 2026).
6. Service Authority for Freeways and Expressways (SAFE) budget and transfer agreement (July 2025)
7. dibs Progress Report (through June 2026)
8. Attend statewide CalSAFE Conference (October 2026)
9. Attend Caltrans board meetings (June 2026)
10. New TDM Strategies (On-going through June 2026)
11. Monitor the implementation of the new trip planning system (launched March 2025) and make necessary adjustments to improve functionality and user experience through June 2026.

E. Funding Sources:

CMAQ –	\$300,000.00
Local Transportation Authority MK PM)	\$3,401,849.00

MCAG \$200,000.00

SAFE \$174,000.00

F. Responsible Agency:

SJCOG

\$4,075,849.00

G. Staff Required (Person Months)

SJCOG

8.0

## **1201.01 FREEWAY SERVICE PATROL**

- A. Previous Work: SJCOG began operating the Freeway Service Patrol (FSP) on Interstate 205 in 1996 as a method to offset construction delays during the first phase of I-205 widening. In January 2018 SJCOG implemented new service on State Route 120 in Manteca connecting through State Route 99 South to the city of Ripon as well as State Route 120 in Manteca connecting to Interstate 5 North to French Camp. In November 2018 new service was also implemented on State Route 99 and new services between Kettleman Lane and Arch Rd. Currently, the FSP is operated as a congestion relief strategy with state funds. SAFE and Measure K funds are used to match state funding for the FSP. In January 2022, FSP modifications were implemented, and new service was introduced on I-5 and SR 4.
- B. Purpose: To operate the FSP on I-205, I-5, SR 4, SR 120, and SR 99 and other areas identified as areas in need.
- C. Tasks:
1. Continue operating FSP on all existing routes and communication with partners Caltrans and CHP.
  2. Manage FSP contracts with towing service provider and online activity tracking tool and process related invoices.
  3. Continue to assess routes for potential modifications.
  4. Monitor and evaluate effectiveness with new radio service.
  5. Attend training and meeting as needed to ensure smooth transition of the radio service.
  6. Issue procurement for FSP service to start July 2026.
  7. Execute funding transfer agreement with SACOG for FSP funding.
- D. Products & Schedule:
1. FSP service on I-205, I-5, SR 4, SR 120, and SR 99 (continuous July 2025-June 2026)
  2. FSP Online Tracker and website (ongoing through June 2026)
  3. Contracts with towing service providers (through June 2026)
  4. Radio service (continuous through June 2026)
  5. Procurement for FSP service (July 2025)
  6. Funding transfer agreement (July 2025)

E. Funding Sources:

SB1 FSP	\$1,033,284.00
Caltrans FSP	\$1,201,694.00
Capital Valley SAFE	\$356,000.00

F. Responsible Agency:

SJCOG  
\$2,590,978.00

G. Staff Required: (person-months)

SJCOG  
3.0

## **1201.03 SJCOG INTERNSHIP PROGRAM**

- A. Previous Work: The San Joaquin Council of Governments supports opportunities to bring in students or recent college graduates for hands-on work experience in regional transportation planning. Many interns that have completed SJCOG's internship program have gone on to pursue planning careers in public agencies.
- B. Purpose: To offer internship opportunities to college students or college graduates looking for a part-time or full-time, entry-level internship to gain exposure and experience in the regional transportation planning field. Interns work with regional planning professionals on various assignments. Primary emphasis in this year's work program is internships to support Regional Transportation Plan/Sustainable Communities Strategies implementation and update activities, San Joaquin Regional Climate Collaborative project activities, technical assistance for transit-related and active transportation planning activities, as well as the VAMOS app project under the Sustainable Transportation Equity Program (STEP). These assignments will enable SJCOG to cost-effectively meet deliverables and work products scheduled in the overall work program while providing a coaching/mentoring program for interns. As a part-time internship, compensation is on an hourly basis and without benefits. In the upcoming and just previous fiscal years, SJCOG has worked with the Civic Spark program to obtain two to three full-time interns (also referred to as "fellows"). These interns are employed by the program sponsor, Public Health Institute, through a sponsorship fee.
- C. Tasks:
1. Assist in SJCOG's transit and active transportation program implementation and reporting activities.
  2. Develop spreadsheets, tables, and charts as it relates to federal-aid project delivery and tracking.
  3. Assist in regional planning studies, regional initiatives such as the San Joaquin Regional Climate Collaborative, policy research and SB1 studies.
  4. Provide technical review, analysis, and document write-up as needed for RTP implementation and update activities.
  5. Create technical work products such as GIS maps, issues papers, and memorandums on regional planning and policy.
  6. Assist in the planning, data-tracking, and implementation of the SJCOG VAMOS trip planning and ticketing app.
- D. Products & Schedule:
1. Various technical assignments for RTP Implementation and/or RTP/SCS Update – through June 2026
  2. Maps, reports, memos, and technical assistance for regional planning studies, transit and active transportation activities, regional initiatives, and/or SB 1 Planning Studies – through June 2026.

3. White papers and research papers and related infographics/visualization items on planning issues – June 2026.
4. Spreadsheets and programming tracking tools for federal-aid programs, ongoing and completed-- June 2026.

E. Funding Sources:  
Local Transportation Authority– COG \$62,000.00

F. Responsible Agency:  
SJCOG  
\$62,000.00

G. Staff Required: (person-months)  
SJCOG  
1.0

## **1301.01 PERFORMANCE-BASED PLANNING AND PROGRAMMING**

- A. Previous Work: One of the Federal Emphasis Areas is Performance-Based Planning and Programming (PBPP) which refers to the application of performance management to achieve desired performance outcomes for the multimodal transportation system. Starting in the 2018/19 year, SJCOG's federal and state transportation partners have asked that a separate work element be identified within the Overall Work Program. SJCOG applied performance-based planning and programming strategies during the development of its Regional Transportation Plan/Sustainable Communities Strategies (RTP/SCS). Specifically, SJCOG identified SCS performance metrics and then evaluated performance indicators among four distinct RTP scenarios. Performance metrics help policymakers examine the differences in performance outcomes between the four multimodal transportation system alternatives. Some other work products in the past have included the Congestion Management Process, Congestion Mitigation and Air Quality (CMAQ) program call for projects, and programming documents including the Federal Transportation Improvement Program and the State Transportation Improvement Program.

SJCOG has participated in MPO and state agency workshops on performance-based planning and has been an active participant in a technical advisory group for PM3 – System Reliability, Freight, and CMAQ. SJCOG incorporated the adopted statewide PM1 (safety), PM2 (transportation asset management), and PM3 performance measures and targets into the 2018 and 2022 RTP/SCS and more fully evaluated these system measures in a 2021 update to the Congestion Planning Process plan. To prepare for and begin implementation of PM3, SJCOG included a congestion level and travel time reliability analysis in the 2018 RTP/SCS. This analysis supports both the existing condition and needs assessment component for PM3, as well as SJCOG's Regional Congestion Management Process. It will form the basis of SJCOG's future work in this area.

- B. Purpose: To articulate a performance-based planning and programming framework that provides for a greater level of transparency and accountability, improved project decision-making, and more efficient investment of state and Federal transportation funds. To implement effective practices in the use of performance information to guide collaborative decision-making among SJCOG partners, member agencies, public, and Board.

To document examples of performance-based provisions including collecting performance data, selecting, and reporting performance targets for the San Joaquin metropolitan planning area, and reporting actual system performance related to those targets on an annual basis. To ensure strong engagement of stakeholders and identify any key challenges and opportunities to this planning and prioritization process.

- C. Tasks:
1. Participate in training, workshops, meetings & related PBPP activities.
  2. Engagement with SJCOG partners, public, and various committees on PBPP information.

3. Coordinate with Caltrans, FTA, and transit operators to discuss how to link public transportation investment priorities to the achievement of performance targets in the areas of Transit Asset Management and Transit Safety.
4. Coordinate with Caltrans, FHWA, and SJCOG member agencies to discuss how to link roadway transportation investment priorities to the achievement of performance targets in the following areas: Highway Safety; Highway Pavement and Bridge Conditions, System Performance – National Highway System (NHS) Congestion; System Performance – Freight; System Performance – Congestion Management and Air Quality (CMAQ) Program.
5. Evaluate the effectiveness of the RTP and FTIP in meeting the goals of the federal transportation Performance Measures (PM); specifically, PM 1 (highway safety), PM 2 (highway pavement and bridge conditions), and PM 3 (system performance, freight, and Congestion Management and Air Quality program), as deemed necessary This evaluation should start this fiscal year and be reported in the next RTP and FTIP.
6. Update a webpage that reports on PM metrics by compiling regional performance measure data and system performance.
7. Research ways of improving PBPP efforts.
8. Coordinate with Caltrans, FHWA, and SJCOG member agencies to discuss any changes to the performance metric assessment of the Surface Transportation Block Group (STBG) program, as deemed necessary.

D. Products & Schedule:

1. Report performance metric targets, as defined by Caltrans – as deemed necessary through June 2026.
2. Analyze and update performance metrics webpage, as defined by Caltrans – June 2026.
3. Memorandum or plan reporting on PBPP efforts, as deemed necessary, through June 2026.

E. Funding Sources:

Local Transportation Authority - COG	\$57,383.00
Local Transportation Authority – PM	\$32,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>
\$57,383.00	\$32,000.00

G. Staff Required: (person-months)

<u>SJCOG</u>
3.0

## **1350.02 REGIONAL EARLY ACTION PLANNING PROGRAM (REAP) 2.0**

- A. Previous Work: This new work element was added to the SJCOG's work program in late FY 22/23. Work during FY 2023/24 included coordination with HCD and SJCOG's member agencies, included agreement execution, outreach to stakeholders, developing and submitting the full program application and developing guidelines and sub-regional applications, as well as attending monthly meetings with other state and regional agencies. Regional and local REAP 2.0 projects began full implementation during FY2023/24 and have carried over into subsequent fiscal years. The suite of projects is expected to close out during FY 25/26.

### Completed Work Products:

- Prepared 10% Advance Application and approved by HCD (August – November 2022)
  - Prepared and submitted REAP 2.0 Full Application (June - December 2022)
  - Developed methodology for Formula-Funded Local Programs and Projects (January – March 2023)
  - Developed criteria checklist for qualified local jurisdiction projects to receive REAP 2.0 funds (March – September 2023)
  - Technical assistance workshop on the contents of the criteria checklist: September 2023.
  - Developed local jurisdiction project application materials (June 2023 – March 2024)
  - Provide technical assistance and pre-application consultation to local jurisdictions preparing their REAP 2.0 project scopes (through June 2024, ongoing through following fiscal years)
  - Coordinated with HCD and interagency partners on responding to REAP 2.0 Full Application questions and revisions, with approval tentatively granted in December 2023 (January – December 2023)
  - Refined project scope and prepared a request for proposals for the Regional Connectivity and Mobility Plan (October 2023 – January 2024)
  - Conducted procurement for Regional Connectivity and Mobility Plan and award a contract (January – June 2024)
  - Housing Priority Neighborhoods nomination process: Neighborhoods identified October 2024.
  - Regional Multimodal Connectivity Plan and Recommendations: Plan complete in March 2025.
  - Administrative steps to set up a housing fund, set-up governance structures, procure housing fund manager. (August 2022 – June 2025 – on-going)
  - Identify and apply for state and/or federal matching funds, seek private or philanthropic funds. (August 2023- ongoing)
- B. Purpose: The REAP 1.0 program (all activities completed in FY 24/25) provided one-time funding made available from the California Department of Housing and Community Development (HCD) to support housing planning at the regional and

local level. REAP 2.0 is a follow-on program to support transformational housing project development. REAP 2.0 activities consist of developing and implementing four programs supported by a \$9.9 million REAP 2.0 grant. The programs must meet multiple state objectives prioritizing infill development, providing housing for people of all incomes, placing housing in locations with good transportation options to reduce the need to drive, affirmatively furthering fair housing, and accelerating the implementation of existing regional and local plans to achieve these goals.

## C. Tasks

### Task 1: Administration of the REAP 2.0 Grant

This task includes administering the various activities of the project to ensure that the requirements of the REAP 2.0 grant are being met. Administration activities include monitoring budgets and timelines, processing invoices, and ensuring that qualified Sub-grantee projects are awarded grant funds.

*Sub-Task 1.1* Program initiation includes developing a project webpage, assigning staff, and developing work plans and timelines.

*Sub-Task 1.2* Develop and implement a process to sub-allocate REAP 2.0 funds to Sub-grantees.

*Sub-Task 1.3* Prepare progress reports every two months that will be distributed to staff and management and accessible via the project webpage.

*Sub-Task 1.4* Conduct outreach or provide technical assistance on unforeseen program-wide issues in grant implementation.

### Task 2: Regional Multimodal Connectivity Plan:

The Regional Multi-Modal Connectivity Plan will survey existing infrastructure in nominated housing priority neighborhoods, identify needed clean mobility infrastructure, and then recommend demonstration projects that will be capital investments in the neighborhoods. Particular focus will be given to ensuring geographic equity and promoting the goals as detailed in the REAP 2.0 guidelines. The planning process will include substantial public outreach and engagement, as well as a technical advisory committee to include local jurisdiction and state agency staff, transit agencies, and other interested stakeholders.

*Sub-Task 2.1* Develop housing priority neighborhoods nomination criteria (complete).

*Sub-Task 2.2* Complete housing priority neighborhoods nomination process (complete).

*Sub-Task 2.3* Procure regional professional services(complete).

*Sub-Task 2.4* Develop regional multi-modal connectivity plan and recommendations (complete).

*Sub-Task 2.5* Project management of demonstration project(s).

*Sub-Task 2.6* Implement demonstration project(s).

### Task 3: Regional Housing Acceleration Fund Set-Aside for Affordable Housing

The set-aside would enable the administrative setup of an affordable housing financing mechanism, which will provide a funding source for much-needed housing for lower-income households. The set-aside of REAP 2.0 funds in combination with other funds raised, be made available for demonstration projects. Demonstration project scoring criteria will be developed to prioritize projects within disadvantaged and historically underserved communities within high-resource areas as identified in the CTCAC/HCD Opportunity Area Maps.

*Sub-Task 3.1* Initiation of administrative steps to set up a housing fund.

*Sub-Task 3.2* Identify and apply for state and/or federal matching funds, seek private or philanthropic funds.

*Sub-Task 3.3* Develop and adopt guidelines for demonstration projects.

*Sub-Task 3.4* Call for projects, scoring, award seed funding.

*Sub-Task 3.5* Demonstration project implementation

### Task 4: Formula-Funded Local Programs and Projects

As the Grantee, SJCOG will sub-allocate REAP 2.0 funds to the Sub-grantees for projects that are qualified for funding based on REAP 2.0 Guidelines. SJCOG staff will develop an allocation methodology for pass-through funding to each jurisdiction in San Joaquin County. SJCOG staff will also develop a funding checklist. All programs or projects proposed by a sponsoring agency to be funded by REAP 2.0 funds must meet the requirements listed in the funding checklist.

*Sub-Task 4.1* Select methodology to allocate REAP 2.0 funds. Attain sub-grantee support for selected methodology (complete).

*Sub-Task 4.2* Develop a checklist of criteria for qualified projects to receive REAP 2.0 funds (complete).

*Sub-Task 4.3* Conduct a technical assistance workshop on the contents of the criteria checklist (complete).

*Sub-Task 4.4* Provide ongoing technical assistance to sub-grantees.

## D. Products & Schedule for FY 25/26

### Administration of the REAP 2.0 Grant

- Staff coordination meetings/meeting notes: July 2025 – June 2026
- Quarterly Progress Reports: July 2025– June 2026
- Research or provide technical assistance – as needed: July 2025 – June 2026

- Regional Multimodal Connectivity Plan
- Demonstration Project(s) Project Management: July 2025 –June 2026
- Regional Housing Acceleration Fund Set-Aside for Affordable Housing
- Set up a housing fund: July 2025 - December 2025
- Identify and apply for state and/or federal matching funds; seek private or philanthropic funds: July 2025 – June 2026
- Guidelines for project selection: July 2025 – June 2026

Formula-Funded Local Programs and Projects

- Administer cooperative agreements, process invoices, compile and submit quarterly reporting to HCD (July 2025 – June 2026) Technical assistance to sub-grantees – as needed: July 2025 – June 2026.

E. Funding Sources:

California Department of Housing and Community Development

(FY 22-23 – FY 25/26) \$9,988,249.05

FY 25/26                      \$8,000,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Consultant</u>	<u>Jurisdictions</u>
\$600,000.00	\$1,500,000.00	\$5,900,000.00

G. Staff Required: (person months)

SJCOG  
12.0

## **1379.01 Clean Mobility Options Voucher (CMO) Program (Bike Share)**

- A. Previous Work: This work element was amended into the FY2024-25 OWP in December 2024. Work in this work element began in February 2025 with formalizing of agreements with the grant funder.

Completed Work Products:

Completed work products in FY24/25 include executing agreements with the funder and vendors and successful transition of the program implementation from STEP to CMO program funding.

- B. Purpose: SJCOG and its project partners launched an affordable, electric pedal-assist bike share program beginning in 2022 under a state Sustainable Transportation Equity Project (STEP) grant. This Clean Mobility Options (CMO) funding will continue and expand the work begun under the previous funding, which sunsets December 31, 2024. The original Bike Stockton bikeshare program has a total fleet of 125 electric pedal-assist bikes with approximately 70-80 deployed at either university and affordable housing locations, or as part of an equity-based long term lending program in and around disadvantaged communities in South Stockton. The CMO bikeshare funding will continue what STEP started and expand into other underserved and disadvantaged communities with new locations, services, and an expanded fleet. The service offers a new way to travel to destinations that are difficult or not feasible to access by existing transit or other mobility options such as medical appointments, social services, work, and other trips. The bikeshare program can also serve as a recreational opportunity to improve public health, reduce vehicle miles traveled, and reduce greenhouse gas emissions.

- C. Tasks (tasks will carry into subsequent fiscal years over four-year grant term ending in year 2029):

- Clean Mobility Options Voucher administration, including progress reporting, invoice review, and preparation of reimbursement requests
- Project management to include planning and coordination with subcontractors and community partners to finalize new stations and hubs, determine distribution and purchase of additional bikes and related infrastructure improvements, and monitor utilization of the service.
- Develop and implement marketing and outreach activities to promote membership sign-ups for existing and new program locations, as well as encourage new site hosts.

- D. Products & Schedule: (products into subsequent fiscal years over four-year grant term ending in year 2029):

1. Grant administration and contract management, ongoing activity (February 2025 – end of grant)
2. Project management, planning and coordination, ongoing activity (February 2025 –end of grant)
3. Program operations, maintenance, bike and infrastructure procurement,

marketing, outreach, and partnership development activities (February 2025 – end of grant term)

E. Funding Sources:

Clean Mobility Options Voucher

(administered by CALSTART)      \$1,685,000.00

F. Responsible Agency:

SJCOG/Sub-grantees

\$1,685,000.00

G. Staff Required: (person months)

SJCOG

2

## **1380.01 CLEAN MOBILITY OPTIONS VOUCHER (CMO) PROGRAM**

- A. Previous Work: This work element was amended into the FY 2021/22 OWP in October 2021 and began implementation that year.

Completed Work Products:

- Contract execution with voucher program administrator (October 2021)
- Insurance compliance (January 2022)
- Subcontracts execution (April 2022)
- Project planning and coordination activities (complete June 2022)
- Grant administration and contract management activities (ongoing through June 2025)
- Plus Up application for funding approved, increasing total award amount to \$1.5 million (August 2023)
- Baseline survey distribution and outreach (September – November 2023)
- Tracy Homes Launch - Operational Milestone (December 2023 – January 2024)
- Site host coordination and partnership development (ongoing through June 2025)
- Various proposed carshare stations were approved (October 2023)
- Vehicle procurement (October 2024)
- Fully Executed City of Stockton Site Host Agreement (January 2025)
- Plus Up application for funding approved, increasing total award amount to \$1.8 million (March 2025)

- B. Purpose: SJCOG and its partners will launch an affordable round-trip carsharing service featuring 11 electric vehicles distributed across up to three locations throughout San Joaquin County at sites owned and/or operated by the Housing Authority of the County of San Joaquin and City of Stockton. The new service will provide low-cost hourly and daily rentals to low-income residents. The service offers a new way to travel to destinations that are difficult or not feasible to access by existing transit, such as medical appointments, grocery shopping, family visitation, and other trips.

C. Tasks:

- Clean Mobility Options Voucher administration, including progress reporting, invoice review, and preparation of reimbursement requests
- Planning and coordination with subcontractors and community partners to finalize up to three EV charging stations, determine distribution of electric vehicles, monitor utilization of the service
- Marketing and outreach activities to promote membership sign-ups for the new EV carsharing program

D. Products & Schedule:

1. Grant administration and contract management, ongoing activity (July 2025 – June 2026)
2. Project planning and coordination, ongoing activity (July 2025– June 2026)
3. Program launch completed January 2024
4. Program operations, maintenance, marketing, outreach, and partnership

development activities (ongoing task carrying over from previous fiscal year July 2025 – June 2026), will carry over to subsequent FYs.

E. Funding Sources:

Clean Mobility Options Voucher

(administered by CALSTART) FY 21/22 \$1,028,350.87

F. Responsible Agency: \$ (000)

SJCOG

\$1,028,350.87

G. Staff Required: (person months)

SJCOG

3.0

## **1382.01 SAN JOAQUIN REGIONAL CLIMATE COLLABORATIVE (RCC)**

A. Previous Work: This Work Element was added in late FY22/23 OWP. Project work kicked off and several key administrative tasks were completed in FY2023/24 and FY2024/25.

Completed Work Products:

- Executed master agreement with SGC (June 2023)
- Executed sub-agreement contracts (October 2023)
- Submitted quarterly status reports (July 2023 to June 2025)
- Conducted SGC site visit with RCC partners (November 2023)
- Developed project evaluation plans (June 2024)
- Developed a community engagement plan to identify priorities in Communities of Focus to ensure RCC activities are responsive to needs and priorities in Communities of Focus (April 2024)
- Developed a clearinghouse for the region's plans, research, resources, and collaboration (May 2024)
- Identify participants in Communities of Focus to join the Collaborative's Community Advisory Board (July 2024)
- Attended SGC-facilitated learning sessions (July 2023 to June 2025)
- Finalized the San Joaquin Regional Climate Collaborative Action Plan – June 2024
- Began Educational Workshop Series (April 2024 to May 2026)
- Completed a Climate Action Plan Evaluation (CAPE) Report (October 2024)
- Conducted a Needs Assessment Survey (January 2025)

B. Purpose: The Regional Climate Collaborative (RCC) is a competitive grant awarded to SJCOG in FY 22/23 by the California Strategic Growth Council (SGC). This is a multi-year grant that encompasses five sub-grantees. The grant will fund collaboration, capacity building, and technical assistance activities to assist communities in securing funding for climate-related projects and programs. The grant-funded activities will focus on assisting under-resourced communities throughout the region, especially in Lodi, Tracy, and Stockton as identified in the successful grant proposal. The funded activities and deliverables include establishing a regional climate collaborative, developing an action plan to deliver capacity-building training and technical assistance to under-resource communities, community outreach, and engagement to identify needs and develop climate solutions, as well as workshops and training to assist community organizations and local jurisdictions in applying for funding opportunities focused on climate resiliency and adaptation.

C. Tasks:

Task 1: Track progress and evaluate outcomes

This task includes deliverables such as an evaluation plan and quarterly data collection and reporting. The activities under this strategy enable the collaborative to articulate desired outcomes, determine what success looks like, and how to evaluate effectiveness of project activities in meeting desired outcomes. Quarterly data collection and reporting will facilitate any potential refinement of activities being conducted by the

partners to build capacity and relationships, and foster community-led plans, projects, and programs.

#### Task 2: Engage in SGC-facilitated peer-to-peer learning sessions

This strategy is included for the partners to participate in SGC-facilitated peer-to-peer learning sessions throughout the grant term. As an emerging collaborative, the partners will be building a new regional platform for coordination on climate resilience efforts. Partners will benefit from learning and engaging with peer groups that will likely range from established RCCs to emerging RCCs. The learning sessions will provide an opportunity to exchange lessons learned and put into place best practices from RCCs throughout the state that could elevate or improve capacity-building activities in the region.

#### Task 3: Build cross-sector partnerships to coordinate and fund climate-related projects

The activities included under this strategy set the stage for an effective collaborative. First, the RCC partners will convene monthly for the full grant term. Through these monthly convenings, the partners will build relationships with each other, strategize on local coordination and outreach, and ensure program objectives are met through project activities. The RCC partners will also identify local stakeholders to make up the Community Advisory Board (CAB). This strategy includes a review of existing plans and projects that address climate resiliency, adaptation, and mitigation across the region. This activity is important for building foundational knowledge and understanding of the region's planning and/or project needs, and whether there are gaps. The RCC will then develop an action plan that specifies key activities, identifies roles and responsibilities, and establishes timelines. The action plan will be informed by intended outcomes, capacity-building needs, and ways to maximize the impact of activities.

#### Task 4: Support equitable planning and policy development across Communities of Focus

The activities under this strategy are intended to build capacity and ensure that priorities are identified and documented in Communities of Focus. On the regional scale, Strategy 4 includes the development of a clearinghouse for the region's plans, research, resources, and collaboration. Additionally, educational workshops will cover a range of topics that will inform the RCC partners and stakeholders related to climate vulnerability, displacement risk, workforce development, renewable energy, environmental justice, and other topics of interest to the region. At the local scale, Task 3 will develop a sustainable neighborhood plan for each Community of Focus (e.g., Lodi, Stockton, Tracy). The intent of this task is to ensure that the priorities and projects directly reflect what stakeholders and residents find important in Communities of Focus. To the maximum extent possible, these neighborhood plans will build from existing plans and/or projects.

#### Task 5: Build awareness of, and readiness to pursue, funding opportunities/resources to support a variety of climate priorities within the region

The activities under this strategy bring the necessary training, tools, and assistance needed to pursue funding opportunities. This strategy will build capacity at the local and regional scales. On the regional scale, Task 1 will provide a technical assistance workshop series on relevant funding opportunities available to support climate priorities within the region. Task 2 will provide interested stakeholders with a toolbox compiling resources and materials. This toolbox will complement the clearinghouse deliverable identified under Strategy 4. Task 3 will focus on local capacity building in Communities of Focus with RCC partners working directly with residents and stakeholder groups to prepare project concepts for grant funding. This task may involve assistance from RCC partners to conduct additional community engagement, project development, coordination with state technical assistance, partnership development with local agencies, etc.

Task 6: Conduct outreach and education to increase access to information about regional climate risks and identify/address priorities in Communities of Focus

Activities under this strategy will enable the partners to conduct multiple levels of community outreach and engagement to develop key deliverables across Strategies 3-5. Task 1 will provide an engagement plan that will outline techniques, methods, and formats the partners will use to engage various audiences. Tasks 2-5 identify specific target audiences that the partners would like to reach, ranging from youth, CBOs, residents, public agency staff, and college students. Each task will leverage the expertise of partners and support the learning and capacity-building of other partners for each audience. For example, SSC will lead on youth outreach, UOP CBPR will lead on college student engagement, and SJCOG will lead on public agency engagement. Furthermore, the Communities of Focus outreach will also leverage the experience and relationships of CBO partners with CCDS leading in Lodi, SSC leading in Stockton, and PHA and GRID leading in Tracy.

Task 7: Conduct outreach, education, and data collection to educate community members and inform the development of a community-shaped region-wide plan for network of mobility hubs in priority housing areas, as well as one mobility hub demonstration project in an urbanized hot spot within the County.

Activities under this strategy, funded by the Mobility, Access and Transportation Insecurity (MATI) grant partnership with the University of Minnesota, will enable the partners to conduct multiple levels of community outreach and engagement to support ongoing climate-related community needs assessments in the urbanized areas of Stockton, Tracy, and Lodi. The MATI funds will incorporate a transportation component into these assessments. The MATI project manager and RCC CBO partners, will design and interpret qualitative studies such as surveys. This will inform the design of sketch plans for mobility hubs, a task under the Regional Multi-modal Connectivity Plan, and location selection for demonstration projects. The RCC will also lead and facilitate community engagement efforts. MATI grant funds will fund engagement materials, and the project manager will oversee the development of those materials. The funding for the CBO partners will support those partners in leveraging community relationships to execute the additional engagement, transportation-related community needs

assessments, face-to-face engagement on these issues at community workshops, as well as qualitative data collection and interpretation.

D. Products & Schedule:

1. Grant Administration – operational administrative activities through June 2026
2. Track progress and evaluate outcomes – develop evaluation plan and implement data collection through June 2026
3. Participate in SGC-facilitated learning sessions – through June 2026
4. Convene San Joaquin Regional Climate Collaborative Partners – through June 2026
5. Continue to monitor and implement a previously developed Regional Capacity Building Toolbox that compiles resources and materials created with RCC grant funds to support efforts to pursue grant funding and other activities beyond the grant term – through June 2026
6. Workshops on various climate-related topics – through June 2026
7. Develop a sustainable neighborhood plan with community-identified climate solutions through July 2026
8. Continue to conduct technical assistance and capacity-building activities to support local climate solutions seeking grant funding – July 2025 through June 2026
9. Conduct outreach and education activities –implement activities through June 2026

E. Funding Sources (000):

FY 24/25 carryover                      \$442,396.31

FY 25/26                                      \$357,603.69

University of Minnesota Mobility, Access, and Transportation Insecurity Grant carryover:  
\$25,000.00

F. Responsible Agency:

SJCOG/Sub-grantees

\$825,000.00

G. Staff Required: (person months)

SJCOG

5.0

## **1383.01 Charging and Fueling Infrastructure Grant (CFI): Electrification for All in San Joaquin County**

- A. Previous Work: FY 2024/25 was the first fiscal year of activity. The CFI Grant was awarded in early 2024 with agreements with Caltrans/FHWA executed in late November 2024. A kick-off meeting was held with Caltrans in late November 2024. Other FY 24/25 activities include executing sub-grantee agreements, and kicking off project planning, outreach, and workforce grant elements in preparation of the construction phase for FY 25/26.
- B. Purpose: SJCOG was awarded the full award amount of \$15M from the Charging and Fueling Infrastructure Discretionary Grant Program via the U.S. Federal Highway Administration. The work plan is designed to ensure timely completion of all required project elements, including comprehensive data collection and project reporting. The grant includes installation of 74 level 2 and 40 fast chargers at 20 locations across the county, as well as a workforce development program, and a robust community education and engagement campaign.
- C. Tasks: The work plan will be executed under five major task areas, each with specific sub-tasks, as summarized below. A project schedule is also provided below, following the task descriptions, showing the timing of tasks leading to on-time project completion.

Task 1. Administration and Project Management. As grantee, SJCOG will serve as the Project Manager and will be responsible for all grantee administration duties and project deliverable in coordination with partners and subcontractors. Task 1.1 Kick-off Meeting. The project team will meet with FHWA and Caltrans to discuss the work plan, task performance details, schedule, and approach to issue/problem resolution.

Task 1.2 Project Management. SJCOG will provide project management for the entire duration of the project grant and coordinate with all partners and contractors to adhere to the project schedule and deliverables. Project schedule will be monitored and updated.

Task 1.3 Monthly Project Update Meetings. Monthly team meetings will be held via teleconference to discuss progress. The meetings will follow a defined agenda that will cover project status update, difficulties encountered, upcoming deliverables, and expected progress during the next month.

Task 1.3 Budget tracking and Invoicing to Caltrans. SJCOG will provide project controls and financial management system to track project budget for reporting and invoicing as required by Caltrans and grant requirements. At a minimum, quarterly invoicing will be prepared and submitted to Caltrans for reimbursement.

Task 1.4 Quarterly Progress Reporting. Quarterly Progress Reports will be submitted that include data collection conducted under Task 5 (as delineated by 23 CFR 680.112).

Task 1.5 Annual Reporting. Annual Reports will be submitted that include the following information (as delineated by 23 CFR 680.112): Maintenance and repair cost per charging station for the previous year; charger utilization; outreach, education, and workforce development.

Task 1.6 Final Report. At the completion of the project, SJCOG will submit a final report to FHWA that documents key project outcomes and an overview of the data collection effort.

Task 1.7 Project Closeout. Final invoicing, reporting and other closeout activities will be conducted as required of the grant.

Task 2: Outreach Engagement and Workforce Development. SJCOG will work with partners Housing Authority of San Joaquin County and the Institute for Local Government to develop and implement a number of different programs to support current and expand on programs under this project. Key objectives include: build awareness of the specific EVSE stations; build awareness of EV benefits to the local community; share incentive information to increase access to EVs in low-income and disadvantaged communities; and work with local community colleges and community partners to provide training and resources to build career paths in the green job market including opportunities to become apprentices and EV infrastructure technicians.

Task 2.1: Identify Outreach Support

- Assess what relationships exist between community-based organizations, stakeholders, the project team and other project partners
- Evaluate whether existing relationships align with the community demographics and determine if any gaps exist where segments of a community are not represented.
- Identify and reach out to community-based organizations and/or community leaders that represent groups missing from the landscape.
- Develop, maintain, and manage relationships with community-based organizations, community leaders, and other stakeholders.

Task 2.2: Needs Assessment.

- Surveys: The community engagement team will coordinate with the full project team to gather feedback and data through online and/or written surveys as needed. This would be particularly helpful in reaching community residents with limited access to attend an in-person meeting or event or prefer to provide written comments.

Task 2.3: Community Engagement/Education Activities

- Community Workshops, Webinars, and Focus Groups: The project team will use virtual and in-person meetings to give residents and other stakeholders the opportunity to regularly interact with, learn from, and inform project staff (city, COG

and other partners) while helping to create a sense of community and belonging between the project team and project beneficiaries. The timing and design of these workshops, webinars, and focus groups will take into consideration schedules and needs of participants including language access, childcare, meals and transportation cost/ease of access. These will include a mix of presentations, interactive exercises, Q&A and other opportunities to provide feedback. The primary purpose of these workshops, webinars, and focus groups may vary depending on the needs of the project, but they may be for either educating and/or engaging the community in ways related to the project.

- **Community Updates Portal:** The project team will create and maintain a “one stop shop” website where residents, local businesses and other stakeholders can find project updates, key milestones, engagement opportunities, resources, and other opportunities. The website will also provide educational materials that residents can use to take advantage of the project’s benefits as they are implemented. This information will also be shared via social media.
- **Project Newsletter:** The project team will create and distribute an e-newsletter to share engagement opportunities, project updates, and other information with stakeholders, residents, and other interested parties.
- **Hosted Events:** As needed, the project team will look to host events within the project area to celebrate and announce project milestones; demonstrate how to use, purchase, and/or sign up to benefit from electric vehicles and related infrastructure in their area.

#### Task 2.4: Community Engagement Evaluation

- Using the TIERS Evaluation Worksheet to ensure a representative level of engagement from disadvantaged communities.
- Analyzing feedback from engaged stakeholders to ensure they feel the process is inclusive, informative, and helpful to the project team and the community.
- Ensuring transparent forms of communication clearly delineate how community feedback is incorporated into the project design and implementation, development of project timelines that is responsive to the community’s needs and expectations, and that information is readily available.

Task 2.5: Workforce Curriculum Development. Develop curricula for additional course offerings for the Green Economy Workforce Development training program. Topics to be determine in conjunction with those in the Green Economy Sector.

#### Task 2.6: Recruiting for Green Economy Workforce Development Courses

- In collaboration with the partners, and local Workforce Investment Board, recruit candidates for the trainings that will be available for residents of the county.

Task 2.7: Implement EV Charging Station Installation and Maintenance Training Curriculum.

- Partner with a local community college to offer the 50-hour EV technician curriculum developed under a previous grant. Utilize industry partnerships to place graduates of the program into non-electrician jobs as EV charging technicians or network troubleshooters.

#### Task 2.8: Implement all Green Economy Training Courses

Partner with local educational institutions and agencies to offer the other Green Economy Workforce Development Courses.

#### Task 2.9: Track all training and job placement

Task 3: Preliminary Engineering and National Environmental Policy Act (NEPA) Determinations. SJCOG will work partner agencies and key stakeholders to finalize site locations, preliminary engineering and obtain NEPA determination and approval with Caltrans.

Task 3.1: Finalize Site Locations and Host Agreements. SJCOG will work with partner agencies to finalize site locations and execute site host agreements. .

Task 3.2: Procurement of Consultant/Contractor. SJCOG will solicit an RFP to procure engineering services, NEPA compliance, equipment procurement, construction management assistance in site infrastructure improvements and operations/maintenance of charging facilities

Task 3.3: NEPA Preparation and Final Determination. SJCOG in coordination with Engineering consultant will initiate and prepare documents that will comply with CEQA and NEPA requirements for all sites. Final determination and approval will be in coordination with Caltrans.

Task 4 Design, Construct and Commission 20 Charging Stations. Twenty new sites will be designed, constructed, and commissioned to support the local community. Each site will undergo the same set of subtasks. Each site will include two DC fast chargers and four Level 2 EVSE and a 110V plug for electric bicycles and scooters.

Task 4.1: Engineering Design, Utilities Design, and Permitting. The engineering consultant will conduct a site walk and develop an engineering design for each site in coordination with the Authorities Having Jurisdiction (AHJ). The consultant will also coordinate with the local utility for power availability and connection, permitting and approvals with AHJ, and all other requirements for construction implementation. Consultant will design and prepare complete construction specifications and plans for each site location.

Task 4.2: Equipment Procurement. Charger, switchgear, panels and other major equipment requiring long lead times will be procured by the Engineering Consultant as noted in the construction specifications and plan.

Task 4.3: Infrastructure Construction. Upon approval of all permitting and design plans from AHJ and final CEQA/NEPA determinations from Caltrans, consultant will provide assistance to SJCOG during the project solicitation, bid review, contract

award, and construction implementation. Consultant will work with the local electric utility to coordinate grid interconnection and electric utility work plan if needed.

Task 4.4: Charging Site Commissioning. Final commissioning for each of the 20 sites will be managed will be the responsibility of the consultant. Commissioning includes connecting the charging site to the network, documenting all equipment with serial numbers and photographs and training site hosts on operation.

Task 5. Operations & Maintenance, Marketing and Data Collection. Data collection will be conducted in accordance with the requirements of CFR 680.112 and will be completed by the consultant.

Task 5.1: Operations and Maintenance. Consultant will be responsible for the safe operation and maintenance of all charging sites, as well as customer accounts with all electric utilities that provide power to its stations. This also includes ensuring the maintenance of all ancillary equipment such as charger pedestals, information display kiosks or signage associated with the charging station.

Task 5.2: Data collection and reporting. Consultant will provide all the data required by the NOFO including: charging station identifier that associates with collected data any third-party data sharing; charging port identifier; charging session start time, end time, and any error codes associated with an unsuccessful charging session by port; energy (kWh) dispensed to EVs per charging session by port; peak session power (kW) by port; Payment method associated with each charging session; charging station port uptime, as calculated per FHWA guidance for each of the previous 3 months duration (minutes) of each outage; annual reports shall also include: maintenance and repair cost per charging station for the previous year; outreach and education. In addition, as the CFI program requires, data fields are made available, free of charge, to third-party software developers:

**D. Products & Schedule: Some products will be delivered in subsequent fiscal years:**

Grant Administration – continuous through end of grant

Monthly Project Update Meetings – continuous through end of grant

Needs Assessment – July 2025

Community Workshops, Webinars, and Focus Groups – continuous through June 2026

Community Engagement Evaluation – continuous through June 2026 and carrying over to subsequent fiscal years

Curriculum Development. Develop curricula for additional course offerings for the Green Economy Workforce Development training program. - February 2026

Design, Construct and Commission 20 Charging Stations (on-going through July 2026 and complete in subsequent fiscal years)

Operations & Maintenance, Marketing and Data Collection – this task will begin and end in later fiscal years.

Data collection and reporting – on-going through July 2026 and completed in subsequent fiscal years.

Final Report - At the completion of the project, SJCOG will submit a final report to Caltrans/FHWA that documents key project outcomes and an overview of the data collection effort – completed in subsequent fiscal years.

E. Funding Sources:

Federal Highway Administration –CFI Grant	\$15,000,000.00
In-Kind Match – Private Partner	\$3,750,000.00

FY24/25: \$770,000.00

FY25/26: \$7,550,000.00

FY26/27: \$6,930,000.00

FY27/28: \$1,540,000.00

FY28/29: \$980,000.00

F. Responsible Agency:

<u>SJCOG</u>	<u>Sub-grantees/Consultant/Contractor</u>
\$630,925.00	\$18,119,075.00

G. Staff Required: (person months)

<u>SJCOG</u>
3.0