

San Bernardino Associated Governments	Policy	34105
Adopted by the Board of Directors November 25, 1991	Revised	6/4/03
Five-Year Capital Improvement Plans for Local Pass Through Funds	Revision No.	1
Table of Contents		
Authorities Requirements Policies Revision History		

DIVISION 6, FIVE-YEAR CAPITAL IMPROVEMENT PLANS FOR LOCAL PASS THROUGH FUNDS

I. AUTHORITIES

These guidelines are adopted by San Bernardino Associated Governments, acting as the San Bernardino County Transportation Authority, relating to adoption of Five Year Capital Improvement Plans by local jurisdictions outlining the projects which will be funded by the Measure I Transactions and Use Tax, Local Pass-Through Funds. Responsibilities of the Authority are outlined in Revenue and Taxation Code Part 1.6, Public Utilities Code Division 19, and San Bernardino County Transportation Authority Ordinances 89-1 and 90-1.

II. REQUIREMENTS

Ordinances 89-1 of San Bernardino County Transportation Authority, as approved by the voters in 1989, outlines the following requirements:

1. The governing body of each jurisdiction receiving Measure I Local Pass Through Funds must annually adopt by resolution a Five Year Capital Improvement Plan/Project List and a Twenty Year Plan.
2. Locally adopted plans must be available for public review.
3. Five Year Plans and Twenty Year Plans shall be consistent with other local and regional plans.
4. Funds will not be used to replace existing road funding programs or requirements for new development to provide for its own road needs.
5. In the Mountain/Desert subareas, funds will be allocated 65% to arterial roadways and regional needs, 30% to local needs, and 5% to elderly and handicapped transportation services and fare reductions.

III. POLICIES

Each local jurisdiction is required to annually adopt a Five Year Capital Improvement Plan which details the specific projects which will be funded using Measure I Local Pass-Through Funds. Expenditures of Measure I Local Pass Through Funds must be detailed in the Five Year Capital Improvement Plan and adopted by resolution of the governing body. In developing the Five Year Capital Improvement Plans, each jurisdiction shall comply with the following guidance.

1. Five Year Capital Improvement Plans shall specifically identify road improvements, signals, and intersection improvements by street name, boundaries, and project type. Project types may include pavement overlay, construction, reconstruction, widening, or other improvements.

2. In developing the Five Year Capital Improvement Plans, it is recommended that each jurisdiction constrain the total annual amount of the Measure I planned expenditures to 150% of SANBAG's forecasted annual revenue for Measure I Local Pass-Through Funds for the adopting jurisdiction or County subarea, plus any fund balances and/or revenue resulting from bonds secured by Measure I revenue.
3. Five Year Capital Improvement Plans may include general program categories for pavement management programs, system improvements, and general maintenance. The maximum total expenditures of all general program categories in any year shall not exceed 50 percent of SANBAG's total annual forecast revenue for the jurisdiction or County subarea. In the Mountain/Desert subareas, the categorical expenditures will be calculated separately as follows:
 - Regional/Arterial: General program categorical expenditures shall not exceed 50 percent of the Regional/arterial Fund.
 - Local Fund: General program categorical expenditures shall not exceed 50 percent of the local Fund.
4. Any single project expenditure in excess of \$50,000 shall be listed as an individual project and shall not be included in a general program category. A project is defined as a specific road improvement, categorical expenditure, or Measure I eligible program activity.
5. Although not a requirement, SANBAG recommends that Mountain/Desert jurisdictions also list the required 5% elderly and handicapped transit expenditures in their plans to prevent over programming.

IV. REVISION HISTORY

Revision No.	Revisions	Adopted
0	Adopted.	11/25/91
1	Revised Par. III: POLICIES, 3 to add "In the Mountain/Desert subareas, the categorical expenditures will be calculated separately as follows: o Regional Arterial, o Local Fund".	6/4/03
