

San Bernardino Associated Governments	Policy	34100
Adopted by the Board of Directors November 25, 1991	Revised	New 11/25/91
Responsibilities	Revision No.	0

Table of Contents
Authorities Responsibilities Intent Revision History

I. AUTHORITIES

These guidelines are adopted by the San Bernardino County Transportation Authority relating to expenditures by local jurisdictions of revenues generated by the Measure I Retail Transactions and Use Tax. San Bernardino Associated Governments (SANBAG) is the County Transportation Authority. 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. RESPONSIBILITIES

SANBAG has full administrative authority for the [Valley Expenditure Program](#), specifically the Major Projects, Arterial, Commuter Rail, Elderly and Handicapped Transit, and Traffic Management and Environmental Enhancement Programs. The Valley Local Distribution Program, however, represents funds directly apportioned to Valley jurisdictions for local discretionary use. Determination of the projects to be funded by the Local Distribution Program will be at the discretion of the city/county governing body as adopted in the Five-Year Capital Improvement Program and Twenty-Year Transportation Plan of each jurisdiction. Each local jurisdiction shall provide the Authority with a copy of the Five-Year Capital Improvement Program and Twenty-Year Transportation Plan adopted annually.

Different provisions apply for the administration of the [Mountain/Desert Expenditure Program](#). Measure I revenues in the Mountain/Desert programs (local, arterial/regional, and elderly and handicapped transit) are distributed directly to each local jurisdiction. Determination of the local and arterial regional expenditures in each of the categories will be at the discretion of the city/county governing body as adopted in the Five-Year Capital Improvement Program and the Twenty-Year Transportation Plan of each jurisdiction. Each local jurisdiction shall provide the Authority with a copy of the Five-Year Capital Improvement Program and Twenty-Year Transportation Plan adopted annually. The determination of elderly and handicapped transit shall take into consideration the Measure I Elderly & Handicapped Guidelines and shall meet maintenance of effort requirements.

Since the [Mountain/Desert Expenditure Plan](#) calls for subarea determination of an arterial network and a cooperative expenditure program for accomplishing improvements, there shall be an annual review of the adopted Arterial Program of each jurisdiction within the subarea by the Subarea Committee. Authority staff should be involved for purposes of fund forecasting, coordination and record-keeping, however, neither Authority staff nor the SANBAG Board shall exercise an approval function.

Major state highway projects entail considerable complexity and agency interrelationships. Projects may be conceived and developed, usually by more than one local agency in coordination with Caltrans and SANBAG. Because of the State Transportation Improvement Program (STIP) impacts and leveraging opportunities, full Authority/SANBAG involvement is needed on both Valley and Mountain/Desert state highway projects. In the Mountain/Desert, the Subarea Committee shall be the focal point for determination and arrangements pertaining to Measure I revenues dedicated to state highways, similar to the process for arterials. Authority/SANBAG staff and Caltrans should also be involved.

An annual audit of local jurisdiction expenditures of Measure I funds shall be performed. The audit will consist of an examination of expenditures after the fact. If an expenditure is for a legal purpose, valid, and supported by sufficient competent evidential matter, no exception will be deemed necessary. In addition, the converse is true, if an expenditure was outside the intent of the ordinances and policies adopted by the Authority, an exception will be taken.

The audit of local jurisdiction expenditures will be for all expenditures of Measure I revenues controlled by the jurisdiction. This shall include:

Valley jurisdictions:

- Local Distribution
- Arterial, major, or other projects for which the jurisdiction has been named "Lead Agency"

Mountain/Desert jurisdictions:

- Local Funds
- Regional/Arterial Funds
- Elderly and Handicapped Transit Funds
- Any Measure I project for which the jurisdiction has been named "Lead Agency"

Measure I contains a provision that government agencies shall maintain their existing commitment of local transportation related funds for transportation purposes. As documentation of compliance with this provision, each local jurisdiction shall annually provide the Authority with a copy of its Proposition 111 Maintenance of Effort report.

III. INTENT

These guidelines describe allowable expenditures of Measure I funds relating to public streets and highways, public transit, and related public facilities. They are presented to assist local jurisdictions in making determinations as to eligibility, responsibilities, specific determinations, accounting requirements, records, and sources of technical assistance. The SANBAG staff is available to provide additional assistance whenever possible.

IV. REVISION HISTORY

Revision No.	Revisions	Adopted
0	Adopted.	11/25/91