MEETING NOTICE AND AGENDA

REGIONAL PLANNING TECHNICAL WORKING GROUP (TWG)
The Regional Planning TWG may take action on any item appearing on this agenda.

Thursday, December 14, 2006
1:15 – 3:15 p.m.

SANDAG, 7th Floor Conference Room
401 B Street, Suite 800
San Diego, CA 92101-4231

Staff Contact: Carolina Gregor
(619) 699-1989
cgr@sandag.org

AGENDA HIGHLIGHTS

• RECOGNITION OF JEFF TAYMAN AND DENNIS TURNER, BOTH RETIRING
• UPDATE ON HOUSING ISSUES
• 2007 REGIONAL TRANSPORTATION PLAN (RTP): PROPOSED TRANSIT STRATEGY FOR 2030 UNCONSTRAINED NETWORK
• 2007 REGIONAL TRANSPORTATION PLAN (RTP): ENERGY WHITE PAPER

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REGIONAL PLANNING TECHNICAL WORKING GROUP  
Thursday, December 14, 2006

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<td>WELCOME AND INTRODUCTIONS</td>
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<td>PUBLIC COMMENTS AND COMMUNICATIONS</td>
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<td>Members of the public will have the opportunity to address the TWG on any issue within the jurisdiction of the Working Group. Speakers are limited to three minutes each.</td>
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**CONSENT ITEMS (3 through 5)**

+3. SUMMARY OF THE OCTOBER 12, 2006, TECHNICAL WORKING GROUP (TWG) MEETING  
   
   The TWG should review and approve the attached meeting summary.  

+4. CALIFORNIA REGIONAL BLUEPRINT PLANNING PROGRAM GRANT RENEWAL APPLICATION (Jane Signaigo-Cox)  
   
   The California Business, Transportation, and Housing Agency is awarding $4 million in California Regional Blueprint Planning Grant Program funding during FY 2007 to current Metropolitan Planning Organization grantees to complete or enhance the implementation of regional comprehensive plans in the state. The grants are administered by Caltrans with assistance by the Department of Housing and Community Development. In October, the SANDAG Board considered a resolution authorizing the submittal of SANDAG’s grant renewal application for funding from the program to implement various strategic initiatives from the Regional Comprehensive Plan (RCP). Attached is the report considered by the SANDAG Board. SANDAG was recently informed that it received $200,000 for RCP implementation activities.  

+5. REGIONAL COMPREHENSIVE PLAN (RCP) BASELINE MONITORING REPORT (Christine Eary)  
   
   On October 27, 2006, the SANDAG Board of Directors accepted the RCP Baseline Monitoring Report. The report, which addresses comments made by the TWG at its September meeting, serves as a mechanism to track RCP implementation and establishes a benchmark for future monitoring. The Final RCP Baseline Monitoring Report can be found at http://www.sandag.org/rcpmonitoring. The SANDAG Board report is attached for reference.
6. RECOGNITION OF JEFF TAYMAN FOR HIS SERVICE TO SANDAG

After 25 years of service to SANDAG, Jeff Tayman, SANDAG's Director of Technical Services, is retiring. During his tenure at SANDAG, Jeff served as Associate Research Analyst, Associate Regional Planner, Senior Regional Planner, Director of Research and Information Systems, and Department Director of Technical Services. The TWG thanks Jeff for his service to the region and for his extensive and invaluable work with the TWG over the years. Congratulations Jeff!

7. RECOGNITION OF DENNIS TURNER’S SERVICE ON THE TWG

Dennis Turner who represented the City of Carlsbad and the County of San Diego on the Regional Planning Technical Working Group for over 10 years is retiring. The TWG thanks him for his service to the local jurisdictions that he worked for and for his enthusiasm and dedication to regional issues. Congratulations Dennis!

+8. PLANNING COMMISSIONERS LUNCH WORKSHOP: THE ABC’S OF REGIONAL PLANNING IN SAN DIEGO (Bob Leiter, SANDAG; Jim Sandoval, Planning Directors Association (PDA); and Lance Schulte, San Diego Section Of The American Planning Association (SDAPA))

The SDAPA, the PDA, SANDAG, and Caltrans are working together to host a workshop luncheon for planning commissioners, citizen planners, and local planning staffs focused on regional planning in San Diego. The workshop will be held on Friday, January 19, 2007, at the new Caltrans District 11 building from 11 a.m. - 2 p.m. A workshop invitation is attached. Planning directors interested in enrolling their staff members in this workshop should contact Lance Schulte.

REPORT ITEMS (9 through 13)

9. REPORTS FROM TECHNICAL WORKING GROUP MEMBERS

Members of the TWG may report on their activities, upcoming events, and/or planning-related conferences.
10. GENERAL PLAN SUBCOMMITTEE STATUS REPORT
(Jerry Backoff, City of San Marcos; and Coleen Clementson)

At the July 13, 2006, TWG meeting, the City of San Marcos submitted a memo proposing refinements regarding how local jurisdictions document the currency of their general plans as part of the forecasting process. At that meeting, a subcommittee was assembled to reach consensus on a set of questions for a follow-up survey. On September 21, 2006, a subcommittee met and formed the following question for consideration by the TWG for a future survey:

*Is your General Plan current? (Responses to this question may include a description of recent steps taken to ensure currency, such as a review of community needs and demographics; updates to community plans; specific plans or precise plans; traffic studies; updates to the zoning ordinance; certified housing elements; etc.)*

The TWG should review and discuss this proposed question, which could be used for a future survey on the status of local general plans.

+11. UPDATE ON HOUSING ISSUES (Susan Baldwin)

a. Update on the Implementation of RHNA Board Policy No. 033 - A letter was sent to the planning/community development directors with copies sent to the city managers and public works directors to remind them that the RHNA Board Policy will affect the upcoming TDA/TransNet Bicycle Funds, applications for which are due on February 5, 2007.

b. Smart Growth/Housing Forum - SANDAG’s Regional Housing Working Group is planning a smart growth/housing forum which is centered on how community members and developers can work together to implement smart growth projects.

c. Housing Element Meeting with the League of California Cities - SANDAG has discussed the idea of holding a housing element meeting with the League of California Cities to discuss local jurisdiction experiences with the 2005-2010 cycle.

d. Housing Performance Monitoring - In the past, SANDAG has prepared reports on the production of affordable housing for very low and low income households by jurisdiction. The TWG is asked to discuss the preparation of such a report for the 1999-2004 housing element cycle. This report would help determine the amount of very low and low income housing that was produced in relation to the RHNA numbers given our current financial resources and use of regulatory measures.
+12. 2007 REGIONAL TRANSPORTATION PLAN (RTP): PROPOSED TRANSIT STRATEGY FOR 2030 UNCONSTRAINED NETWORK (Dave Schumacher)

Following completion of the Independent Transit Planning Review, staff developed a number of initial transit scenarios to explore how to maximize the effectiveness and efficiency of transit in the 2007 Regional Transportation Plan (RTP). Staff will present the results of the evaluation of these transit scenarios in terms of developing a transit strategy for the 2007 RTP. The action by SANDAG’s Transportation Committee at its December 8, 2006, meeting on this matter will be discussed.

+13. 2007 REGIONAL TRANSPORTATION PLAN (RTP): ENERGY WHITE PAPER (Susan Freedman)

SANDAG has identified several key components to be developed for the 2007 RTP for which staff has prepared white papers to generate discussion and gather input from SANDAG working groups. This paper addresses energy and climate change impacts associated with transportation, alternative fuel and vehicle considerations, and potential energy-saving and emission-reducing measures. The TWG is asked to provide comments on the attached white paper as part of the development of the 2007 RTP.

14. ADJOURNMENT AND NEXT MEETING

The next TWG meeting will be held on Thursday, January 11, 2007, from 1:15 - 3:15 p.m.
SUMMARY OF THE OCTOBER 12, 2006
TECHNICAL WORKING GROUP (TWG) MEETING

Niall Fritz, City of Poway, chaired the meeting. Self-introductions were conducted.

Agenda Item #1: Summary of the September 14, 2006, Technical Working Group (TWG) Meeting

Lance Schulte, North County Transit District, noted a correction to the meeting summary. He stated that his comment on page 12 of the meeting summary should read, “...SANDAG should provide a 30-second soundbite...” rather than a “30- minute soundbite.” A motion and second to approve the September 14, 2006 meeting summary with the noted correction was made. The motion passed unanimously.

Agenda Item #2: Public Comments and Communications

No public comments or communications.

Agenda Item #3: Reports from TWG Members

Ed Schafer, SANDAG staff, announced that the University of California, Davis and Caltrans will be holding a PECAS workshop and invited TWG members to attend. The workshop will be held from 10 a.m. – 2 p.m. at on October 25, 2006, at the Caltrans building. He stated that SANDAG is building a small area forecasting model and Caltrans is developing a statewide model called PECAS, in collaboration with researchers from Alberta, Calgary. Caltrans would like input from California regions on policy issues the model should address. The workshop will include an overview of the PECAS model, as well as provide opportunities for input regarding the policy questions the model should answer.

Rosemary Rowan, County of San Diego, asked if it would be possible to provide input without attending the workshop. Mr. Schafer stated that he is on the Technical Advisory Committee, so TWG members can give their comments to him and he will pass them along. Mr. Schafer added that the SANDAG will spend about three years developing the small area forecast model and Caltrans will spend about three years on their PECAS model, as well.

Bob Leiter, SANDAG staff, stated that at the last Blueprint Learning Network meeting, Mike McCoy, a professor at UC Davis, gave a presentation on where modeling is headed and discussed PECAS and I-PLACE3S. Mr. Leiter suggested that perhaps Mr. McCoy attend a future TWG meeting. He added that SANDAG and SACOG are the most directly involved and will continue to keep TWG members informed on new developments.
Carolina Gregor, SANDAG staff, mentioned the California Chapter of the American Planning Association (CCAPA) Conference is being held October 22-24 in Orange County and stated that she in addition to several TWG members will be attending and if any member would like to carpool, to e-mail her so she could help coordinate rides.

Susan Baldwin, SANDAG staff, discussed the SANDAG Regional Housing Needs Assessment (RHNA) Board policy. She stated she will send an e-mail reminding TWG members that jurisdictions that have completed their housing elements and have done their annual reports will be eligible for TDA non-motorized funding in January 2007.

Bill Chopyk, City of La Mesa, asked how many jurisdictions have certified housing elements. Ms. Baldwin stated that about half of the local jurisdictions have adopted housing elements.

Jim Sandoval, City of Chula Vista, asked what if the housing element is certified in November or December and when does it have to be reported. Ms. Baldwin stated that SANDAG wants to know how many units have been produced in the four income categories, and if a rezoning program has been done, the jurisdiction is in compliance with the schedule in their housing element.

Mr. Fritz reported that at the CCAPA conference, the City of Poway will be receiving the Outstanding Planning Award for Small Jurisdiction.

Barbara Redlitz, City of Escondido, invited TWG members to celebrate the purchase of Stanley Peak on October 21, 2006. There will be opening day activities beginning at 9 a.m. and the City of Escondido is very excited about the purchase as far as contributing to the Multiple Habitat Conservation Program.

Bill Anderson, City of San Diego, stated that the City is releasing a draft of the General Plan, which will be unveiled at a press conference on October 25, 2006. He added that the Housing Element will also be included. There will be a meeting with the Uptown Community to discuss whether or not to update their community plan.

**Agenda Item #4: Roundtable Discussion: Reflecting on Recent Statewide, Regional, and Local Planning Initiatives**

A) “Blueprint Planning in California: Forging Consensus on Metropolitan Growth and Development”

Elisa Barbour from the Public Policy Institute of California (PPIC) provided a presentation on a study recently completed by the PPIC entitled “Blueprint Planning in California: Forging Consensus on Metropolitan Growth and Development.” The study focused on the best practices of regional planning efforts in the four major metropolitan areas of California: Sacramento, the San Francisco Bay Area, Los Angeles, and San Diego. The PPIC identified the following major components and best practices that may help ensure more effective outcomes: identifying goals and objectives, creating an effective decision making process for blueprint development, developing blueprint “visions,” selecting and adopting a “preferred scenario,” and implementing the vision. The study also addressed environmental planning issues as well as the state of California’s role in blueprint planning.
Questions and comments included:

Larry Glavinic, Stakeholders Working Group member, commented that the rural areas feel excluded to the benefit of the urban areas in the planning process and with regard to infrastructure improvements. He asked about short term incentives for transportation improvements.

Ms. Barbour responded that the PPIC was impressed with San Diego’s competitive grant programs or “carrot” approach to implement the RCP, reflecting how good plans and projects can help accomplish the state’s planning goals. She stated that if the right incentives, especially at the state level, are not in place for the development of good regional plans, it might be too much to ask for a collaborative effort to turn the tide against engrained sprawl patterns.

Mr. Fritz stated that the SANDAG forecast done twelve years ago met the region’s projected housing needs by placing a disproportionately high number of housing units on one acre lots. When SANDAG incorporated smart growth principles into its forecast for the Regional Transportation Plan, the forecast constrained uses on rural lands and as a result shifted housing into more urbanized areas. That, in conjunction with the County’s planning process, changed the localized forecast for areas like Valley Center. Current planning efforts have shifted the vision toward maintaining rural areas and intensifying urban areas.

Mr. Glavinic urged that transportation should be looked at first versus last, and that we should be taking a non-linear approach to finding transportation solutions for the region.

Mr. Anderson commented that there are some state programs that could use improvement, particularly the housing elements. Housing element reform could alleviate unnecessary amounts of paperwork, and provide financial incentives at a subregional level for both housing and transportation improvements. Incentives for transportation improvements should be provided not only for capital projects, but also for transit operations, which would result in higher levels of transit services, providing people with an incentive to live in the urban cores because of better and more convenient services.

Ed Kleeman, City of Coronado, suggested an incentive to get people to live in denser areas would be to reduce the property tax in these areas.

B) California Regional Blueprint Planning Program

Bob Leiter, SANDAG staff, provided a presentation that he made at the most recent meeting of the California Blueprint Planning Network in Oakland, California. The state’s Business, Housing, and Transportation Agency is administering the Regional Blueprint Planning Program and has established the Blueprint Learning Network to work with the Metropolitan Planning Organizations (MPOs) and Councils of Government (COGs) to advance regional planning and transportation issues throughout the state. SANDAG received grant funding from the blueprint program last year to implement several Regional Comprehensive Plan (RCP) initiatives and is applying for additional funding this year. The blueprint effort has included a series of meetings with stakeholders throughout the state.

Mr. Leiter stated that while the four major metropolitan areas have already completed their blueprints, other COGs are just getting started. The Blueprint Learning Network provides the opportunity for MPOs and COGs to discuss and share their stories. The Oakland meeting focused on the land use and transportation connection. His presentation highlighted SANDAG’s RCP, Smart Growth Concept Map, and incentive programs.
C) Public Health Impacts of Land Use and Transportation Plans

Tracy Delaney, County of San Diego Health and Human Services, provided a presentation discussing childhood obesity and the emerging connections between public health, land use, transportation planning, and urban design. Childhood obesity is a significant and growing health concern that has reached epidemic proportions. Ms. Delaney stated that today’s generation of children will be the first generation that is not expected to live as long as their parents. The San Diego County Childhood Obesity Action Plan addresses this challenge through multiple strategies and domains.

Questions and comments included:

David Reaman, San Diego Association of Realtors, asked for the breakdowns of obesity rates for different ethnicities and cultures. Ms. Delaney stated that in the Hispanic community, obesity rates are higher and this may be because of economics, culture, genetics, etc. She added that the Native American people have the highest diabetes rates in the world. Mr. Sandoval stated that the reason the City of Chula Vista has gotten involved in land use and public health issues is because the demographics of its citizens are more susceptible to health issues.

Mr. Glavinic suggested an idea that supports both sustainability and co-generation: generate electricity when you are exercising on the treadmill.

Mr. Anderson suggested this presentation be given to community planning groups in San Diego. Ms. Delaney stated she would be happy to do that.

Mr. Leiter asked if the County has interacted with the Environmental Health Coalition (EHC). The EHC is very interested in the interrelationships between development, transportation, and air quality impacts. Mr. Leiter stated that the EHC is working with SANDAG on its goods movement transportation plans. Ms. Delaney stated that it may be possible for the County to partner with the EHC. Mr. Fritz commented that the Air Pollution Control District (APCD) would also be a good partnership.

Mr. Reaman asked if there have been comparisons of the health of people who live in the San Diego region and their relatives who live in Mexico. Ms. Delaney stated that although there may be more studies that she is unaware of, she is aware of a current study of diabetes rates of the Pima Indians that live in Mexico and the United States. She stated that while the Pima Indians living in Mexico have no diabetes, those living in the United States have one of the highest diabetes rates in the world. Ms. Delaney stated that the culture in the United States may be the driving force for these types of health risks.

Mr. Kleeman noted that in the brochure on page five, bullets A and B could be expanded to eliminate any barriers to walking. He stated that barriers like traffic and the width of streets may discourage people from walking and that the focus should be not just on creating walking paths, but also eliminating these barriers.

Mr. Fritz stated that development and streets are too often designed for vehicles and that pedestrian crossings often are not placed where they would be most convenient for the pedestrian.

Ms. Rowan commented that the public health aspect is a very important new component to “selling” the smart growth concept beyond the cost factor. She added that it is very difficult to sell smart growth concepts to decision-makers, and more links to public health could be very effective.
Ms. Clementson stated that Ms. Delaney gave this same presentation to the Regional Planning Committee on Friday, October 6, 2006, and it was extremely well-received.

Stephan Vance, SANDAG staff, stated that there is a statewide project called the Healthy Transportation Network that has focused a part of its program on educating decision-makers about the health effects associated with the urban landscape.

Mr. Fritz stated that a few years ago, SANDAG compiled the Walkable Communities Design Guidelines (Planning and Designing for Pedestrians) and suggested that the County use that as a tool to promote public health.

William Micklin, Stakeholders Working Group, asked if there has been any interaction with the public school system. Ms. Delaney answered that she has talked with representatives from the school systems and has invited them to her working group meetings. She stated that one of the strategies the working group is looking at is breaking into small regional groups and helping to connect them to some of the Caltrans Safe Routes to School funding and provide partnering opportunities with other groups.

Mr. Micklin stated that Fred Kent is big proponent of neighborhood schools; however he sees no acceptance of that by the public school system. Ms. Delaney stated that the schools have their own mandates and regulations so the best way to help them would be to improve surrounding areas so they are more accessible and provide funding opportunities. Mr. Fritz stated that school principals are not happy with the amount of parents that drive their children to school. He suggested working with the Parent Teacher Associations (PTA) to help educate parents and possibly change their behavior. Ms. Delaney stated that the group is trying to work on crime prevention through environmental design and some are true fears and some are perceived fears by parents.

Mr. Sandoval stated that Otay Ranch was designed with child safety in mind. He stated the City worked with the school district on a “walking school bus” program, but has had mixed results. The program relies on parent volunteers and the health benefits of walking may be a good way to get funding for the program.

Mr. Reaman stated that many bike paths in the region often disappear due to lack of commitment and/or maintenance, and that we need to look at how much money is allocated in the transportation planning process for bike paths.

**Agenda Item #10: Adjournment and Next Meeting**

The November TWG meeting is cancelled. The next TWG meeting is scheduled on Thursday, December 14, 2006, from 1:15 – 3:15 p.m.
CALIFORNIA REGIONAL BLUEPRINT PLANNING PROGRAM
GRANT RENEWAL APPLICATION

Introduction

The California Regional Blueprint Planning Program was introduced in FY 2006 and provides funding to initiate or augment existing comprehensive planning efforts of Metropolitan Planning Organizations (MPOs) such as SANDAG. The FY 2007 California State Budget (Assembly Bill 1801) included the appropriation of $5 million to fund Regional Blueprint Planning grants. Approximately $4 million of the FY 2007 appropriation has been set aside for second-year grant funding.

In FY 2006, SANDAG was awarded $409,750 from the California Regional Blueprint Planning Program to strengthen and supplement Regional Comprehensive Plan (RCP) implementation efforts. The grant funds have supported SANDAG’s work on the IPLACE3S (Internet-based PLAnning for Community Energy, Economic and Environmental Sustainability) model, implementation of the RCP Integrated Regional Infrastructure Strategy (IRIS), and goods movement planning in southern California.

In FY 2007, SANDAG will be applying for funding to continue RCP implementation efforts currently underway. The grant funds would strengthen and supplement RCP implementation efforts identified in the current FY 2007 Overall Work Program (OWP) as well as additional efforts that are anticipated to be included in FY 2008 OWP.

The purpose of this report is to inform the Board of Directors of this grant opportunity and to obtain a resolution of support for SANDAG’s grant application.

Discussion

SANDAG will be applying for funding to enhance the following RCP implementation efforts currently underway.

- **Integrated Regional Infrastructure Strategy (IRIS)** - IRIS, as an integral part of the RCP, outlines a forward-looking investment and financing strategy that will help the San Diego region meet its collective infrastructure needs for transportation, storm water management, habitat, and shoreline maintenance. The requested funding would allow SANDAG to
complete updated cost estimates for regional public facility priorities, determine existing sources of funding and the extent of overall funding needs, and pursue other funding sources to fill funding gaps.

- **Smart Growth Urban Design Guidelines** - The RCP calls for preparation of Smart Growth Urban Design Guidelines to provide guidance to local governments, planners, developers, and others in further defining the spatial and transportation design characteristics of smart growth. Work is already underway on the Guidelines, and an ad hoc working group has been assembled to provide input. Additional funding is needed to complete the Guidelines and a multimodal street design technical appendix.

- **RCP Performance Monitoring** - SANDAG has established a procedure to monitor the region’s progress and performance toward RCP implementation through a set of performance indicators. Additional funding is needed to develop specific targets and/or goals for each of the indicators.

- **Funding for PECAS (Production Exchange and Consumption Allocation System) Modeling Implementation** - SANDAG is currently updating its forecasting capabilities by implementing a new forecasting model, PECAS, which is based upon land use and transportation economics. PECAS will allow SANDAG to collaborate with local jurisdictions to evaluate economic impacts of alternative development and transportation scenarios and also will assist the region in identifying areas with redevelopment potential during the forecasting period. The PECAS model will provide a more integrated, robust tool for comprehensive planning and analysis. Additional funding is needed to support data gathering and consultant assistance to fully implement the model.

**Next Steps**

Applications are due November 1, 2006. It is expected that grantees will be announced on or before December 15, 2006, and agreements will be executed early 2007. Should SANDAG receive requested grant funds, the grant funds and required 20 percent local match will be included and addressed in the FY 2008 OWP and Program Budget process.

GARY L. GALLEGOS
Executive Director

Attachment: 1. Resolution No. 2007-09

Key Staff Contact: Coleen Clementson, (619) 699-1944, ccl@sandag.org
RESOLUTION OF SUPPORT TO MANAGE
THE CALIFORNIA REGIONAL BLUEPRINT PLANNING PROGRAM
SECOND-YEAR CONTINUING GRANT

WHEREAS, the Fiscal Year 2006/2007 California State Budget (Assembly Bill 1801) provides for renewal funding of the Regional Blueprint Planning Program to provide second-year grants to help Metropolitan Planning Organizations (MPOs) and Councils of Government (COGs) in the initiation or implementation of regional comprehensive scenario planning that addresses future growth on a long-term planning horizon through the integration of transportation, housing, land use, environmental resources, other infrastructure, and services; and

WHEREAS, SANDAG proposes to receive a second-year grant from the State of California to enhance the implementation actions of the Regional Comprehensive Plan (RCP) that aim to increase the region’s sustainability and encourage “smart growth;” and

WHEREAS, receipt of these funds will impose certain obligations upon SANDAG and require SANDAG to identify at least a 20 percent local match; and

WHEREAS, SANDAG must include awarded projects in an approved Overall Work Program (OWP), OWP Agreement, encumbered by March 1, 2007, and has until February 28, 2008—one year—to complete the projects;

NOW THEREFORE

BE IT RESOLVED that the SANDAG Board of Directors hereby authorizes the submittal of SANDAG’s grant renewal application to the California Regional Blueprint Planning Program and agrees to meet the local match requirement, manage the Regional Blueprint Planning Program grant, and collaborate with the other stakeholders.

PASSED AND ADOPTED this 27th day of October, 2006.

________________________________________           ATTEST: ______________________________________
CHAIRPERSON                   SECRETARY

MEMBER AGENCIES: Cities of Carlsbad, Chula Vista, Coronado, Del Mar, El Cajon, Encinitas, Escondido, Imperial Beach, La Mesa, Lemon Grove, National City, Oceanside, Poway, San Diego, San Marcos, Santee, Solana Beach, Vista, and County of San Diego.

ADVISORY MEMBERS: California Department of Transportation, Metropolitan Transit System, North County Transit District, Imperial County, U.S. Department of Defense, San Diego Unified Port District, San Diego County Water Authority, and Mexico.
REGIONAL COMPREHENSIVE PLAN: BASELINE REPORT FOR PERFORMANCE MONITORING

Introduction

The Regional Comprehensive Plan (RCP), adopted by the SANDAG Board of Directors in July 2004, is now in the implementation phase. Chapter 8 of the RCP describes using performance indicators as a tool to track our progress in implementing the plan. Many of the strategies and actions recommended in the Plan will take years to develop and fund. Therefore, it is important to have a consistent and valid set of indicators that can reflect the sometimes subtle changes that occur over the long run. Future performance monitoring reports on these indicators will be used to assess the degree to which RCP implementation is influencing the quality of life in the region.

Monitoring our progress in implementing the RCP is both a recommendation of the Plan and a legal requirement. Assembly Bill 361 included the specific requirement that SANDAG monitor progress through “realistic measurable standards and criteria, which must be included in the RCP itself and made available to the public.” The list of indicators was published as part of the RCP.

The RCP Baseline Report for Performance Monitoring establishes a benchmark for future monitoring. The Baseline Report discusses the significance of each indicator and identifies targets for certain indicators. Initial analysis of the data collected and a discussion of SANDAG’s work efforts underway that may influence performance over time also are included in the Baseline Report.

Discussion

When preparing the RCP, the Regional Planning Committee, the Regional Planning Technical Working Group (TWG), and the previous Regional Planning Stakeholders Working Group (SWG) developed a set of 39 performance indicators to monitor the region’s progress toward achieving the goals and objectives of the RCP.

The complete set of indicators is included in the attached Baseline Report. Data are available for most but not all of the indicators. Where data were not available, the report explains when data are expected for future reports and identifies the source.

Recommendation

The Board of Directors is asked to accept the RCP Baseline Report for Performance Monitoring (Attachment 2).
**Report Highlights**

While the focus of this report is on establishing a baseline for future annual performance monitoring, the report highlights certain areas where the region appears to be moving in the right direction and others where improvement is needed.

**Moving in the Right Direction**

- Nearly one-third of new housing units built in 2005 were in Smart Growth Opportunity Areas.
- Ninety-nine percent of the region’s housing stock is located within the San Diego County Water Authority’s service area.
- Transit ridership has trended upward with population growth.
- Crime has decreased.
- Beach closures have declined.
- Air quality has improved.
- The share of the region’s energy produced from renewable resources has increased significantly.

**Areas for Improvement**

- The region continues to experience a serious housing affordability problem.
- Congestion on most roads and freeways has increased over the last ten years as have total hours of delay per traveler.
- Many waterbodies have some degree of impairment.
- Several beaches are losing sand.
- Job growth in the region has been concentrated in low-wage industries.

**Public Review**

The Baseline Report was presented to a joint meeting of the Regional Planning and Transportation Committees in August 2006, at which time it was authorized for release for a 60-day public comment period. The report was posted on the SANDAG Web site, and presented to the Regional Planning Stakeholders and Technical Working Groups in September for review and comment.

Staff received a number of comments on the report during the public comment period. Where possible, staff has made changes to the report, largely for clarification and further explanation. While one respondent commented that the report was overly optimistic, overall the report was well received. A summary of the comments received, as well as corresponding responses, can be found in Attachment 1.
Conclusion

Many of the actions and paradigm shifts discussed in the Regional Comprehensive Plan may take years to develop, fund, and implement. Some short-term impacts are likely to be subtle, though some will be more noticeable. This Baseline Report will serve as a benchmark for monitoring progress on a regular basis. If progress is not made over time, SANDAG, through its Policy Advisory Committees and the Board, may wish to re-evaluate the strategies and actions recommended in the RCP.

GARY L. GALLEGOS
Executive Director

Attachments 1. Summary of Comments Received Regarding the RCP Baseline Monitoring Report
   2. RCP Baseline Report for Performance Monitoring

Key Staff Contact: Coleen Clementson, (619) 699-1944, ccl@sandag.org
Summary of Comments Received Regarding the RCP Baseline Monitoring Report

The following comments were received during the public comment period or during one of the following meetings:

August 4, 2006 Joint Regional Planning Committee/Transportation Committee
September 14, 2006 Regional Planning Technical Working Group
September 19, 2006 Regional Planning Stakeholders Working Group

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<th>Public Comments on Indicators</th>
<th>Response</th>
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| **Urban Form and Transportation -**  
  • An indicator that measures public health/safety should be added.  
  • Congestion is overmeasured; tradeoffs should be reflected.  
  • There should be an indicator of goods movement by modality.  
  • The CMP also includes programs to encourage bicycling and walking through RideLink – this should be noted in the SANDAG Role section.  
  • The SANDAG Role section should include the $7 million in TransNet funding that will be spent on bicycle and pedestrian projects.  |  
  • No Change Made – Will be considered for future reports or the RCP update.  
  • No Change Made – Comment noted.  
  • No Change Made – There is currently no policy basis for this in the RCP or RTP, but could be considered in RCP or RTP updates.  
  • Change Made – Information added.  
  • Change Made – Information added. |

| **Share of New Units and Jobs Located in Smart Growth Opportunity Areas -**  
  • ¼ mile proximity to freeways and major transit corridors should be added as a subindicator to better tabulate where smart growth is occurring.  
  • Increase in density should be added as a sub-indicator to better tabulate where smart growth is occurring.  |  
  • No Change Made – Addressed; SGOAs are within ¼ mile of existing or planned transit corridors.  
  • Change Made – Data added. |

| **Share of New Housing Units Within County Water Authority Water Service Boundary -**  
  • The use of this indicator as a measure of sprawl may be criticized – just because a location is within the service area does not mean it is low density and located near transit.  |  
  • No Change Made – Comment noted. |

| **Annual Transit Ridership -**  
  • Proportion of commuters that use transit is a better indicator of performance than number of transit riders.  
  • There should be a ratio of annual transit ridership to VMT.  |  
  • No Change Made – Addressed; Captured in Commute Mode Share indicator.  
  • No Change Made – Addressed; Ridership and VMT are benchmarked within this indicator. |
<table>
<thead>
<tr>
<th>Public Comments on Indicators</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Commute Mode Share</strong>&lt;br&gt;• Mode share needs to be identified for major transit corridors.</td>
<td><strong>No Change Made</strong> – Addressed; Data not currently available but will be included in Travel Times and Volumes in Key Auto and Key Transit Corridors indicator in future reports.</td>
</tr>
<tr>
<td>• No mention is made of walking, biking, or other commute mode shares. If we do not have that data, the report needs to note that, and recommend a plan for collecting that data for future monitoring.</td>
<td><strong>Change Made</strong> – Data added; Data source does not explicitly identify biking mode share, but is presumably included under “Other means.” Sources of data for biking mode share will be investigated for future reports.</td>
</tr>
<tr>
<td>• Many people are no longer commuting to their jobs and are becoming cyber-employees – we should measure how successful the region is doing in this area.</td>
<td><strong>Change Made</strong> – Data added.</td>
</tr>
<tr>
<td><strong>Travel Times and Volumes in Key Auto and Key Transit Corridors</strong>&lt;br&gt;• Add faster commute times on transit (e.g. speeding up trolley passage through downtown corridor).</td>
<td><strong>No Change Made</strong> – Could be addressed in future reports when data is available.</td>
</tr>
<tr>
<td>• Monitoring should also include trip length.</td>
<td><strong>No Change Made</strong> – Data not available.</td>
</tr>
<tr>
<td><strong>Annual Hours of Traffic Delay per Traveler</strong>&lt;br&gt;• Add various sub-locations as points of measurement, specifically at San Ysidro Port of Entry (SYPOE).</td>
<td><strong>No Change Made</strong> – Data not available. This request is not regional in nature.</td>
</tr>
<tr>
<td>• Delay is not solely a result of congestion. It also stems from decisions about where to live, where to work, where to shop, etc.</td>
<td><strong>Change Made</strong> – Explanation added.</td>
</tr>
<tr>
<td><strong>Housing</strong>&lt;br&gt;• The housing numbers need to be put in context with actual home sales of both existing and new homes, as well as condominium shares and resales.</td>
<td><strong>Change Made</strong> – Explanation added.</td>
</tr>
<tr>
<td><strong>Housing Affordability Index</strong>&lt;br&gt;• Add relative percentage for Baja, to include renters.</td>
<td><strong>No Change Made</strong> – Data not available.</td>
</tr>
<tr>
<td><strong>Percent of Households with Housing Costs Greater than 35% of Income</strong>&lt;br&gt;• This indicator should be broken down by household income; need to look at those that are spending more than 50% of their income on housing costs.</td>
<td><strong>No Change Made</strong> – Data not available; data source for this indicator (American Community Survey) is not broken out beyond 35%.</td>
</tr>
<tr>
<td><strong>Ratio of New Jobs to New Housing Units</strong>&lt;br&gt;• This indicator does not capture the increase in the number of low-paying jobs and high-cost homes.</td>
<td><strong>Change Made</strong> – Information added.</td>
</tr>
<tr>
<td>Public Comments on Indicators</td>
<td>Response</td>
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<td>------------------------------</td>
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</tr>
<tr>
<td><strong>Share of New and Existing Units by Structure Type and Income Category</strong> – Add condos.</td>
<td><strong>No Change Made</strong> – Data is not available. Condos may be included in the multi-family OR single-family totals.</td>
</tr>
<tr>
<td><strong>Air Quality Index</strong> –  - Consider all non-attainment air quality standards, some of which are projected to worsen, such as Nitric Oxide. - Add various location points of measurement, specifically at SYPOE.</td>
<td><strong>No Change Made</strong> – Addressed in the report; Nitric Oxide is already accounted for in examination of ozone, as it is one of the precursors to ozone. <strong>No Change Made</strong> – Data not available. This request is not regional in nature.</td>
</tr>
<tr>
<td><strong>Regional Poverty Rate</strong> –  - Add sub-measures where smart growth is occurring, such as increasing sales tax and property tax revenues.</td>
<td><strong>No Change Made</strong> – Data not available.</td>
</tr>
<tr>
<td><strong>Public Facilities</strong> –  - Electricity, renewable, and indigenous supply is not enough – we need to know how much of all fuels are being used. - The actual measure of groundwater security is the ratio of recharge to discharge. - Our energy security either mobile or industrial or residential is not captured. - Public facilities definition should be expanded to incorporate quality/quantity of street lighting, public sidewalks, and freeway access, in addition to park and green spaces.</td>
<td><strong>No Change Made</strong> – An indicator identifying San Diego’s major sources of energy for electricity and transportation could be considered for future reports pending data availability. <strong>No Change Made</strong> – Comment noted; groundwater is one of several sources taken into account in the diversity of water supply indicator. <strong>No Change Made</strong> – This indicator could be considered for future reports pending data availability; would be covered if an energy resource mix indicator is incorporated in the report. <strong>No Change Made</strong> – Data not available. This request is not regional in nature; the public facilities chapter of the RCP deals only with facilities that are regional.</td>
</tr>
<tr>
<td><strong>Diversity of Water Supply</strong> –  - This measure is flawed, as it assumes SDCWA allotment from MWD or IID is stable (in reality USBR may declare a shortage in 2007).</td>
<td><strong>No Change Made</strong> – Comment noted; without data from the United States Bureau of Reclamation to confirm this statement, it must be assumed that the San Diego County Water Authority is meeting its mandate.</td>
</tr>
<tr>
<td>Public Comments on Indicators</td>
<td>Response</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Amount of Reclaimed Water Used</strong> -</td>
<td>• <strong>No Change Made</strong> - Comment noted; the targets are based on goals set in existing plans.</td>
</tr>
<tr>
<td>• The County Water Authority’s goal of only 6% recycled water by 2020 is meager.</td>
<td></td>
</tr>
<tr>
<td>• Measure increases in miles of piping, especially in urbanized areas.</td>
<td>• <strong>No Change Made</strong> - This could be considered as a supplemental measure in future reports, pending data availability.</td>
</tr>
<tr>
<td><strong>Percent of Waste That is Recycled</strong> -</td>
<td></td>
</tr>
<tr>
<td>• Waste disposal should be measured rather than waste recycled.</td>
<td>• <strong>No Change Made</strong> - Addressed; waste disposal total is obtained by subtracting the percent of waste recycled from 100.</td>
</tr>
<tr>
<td>• Refer to the Public Resource Code section that refers to this rather than AB939 (Public Resource Code Sections 41780-41786).</td>
<td>• <strong>Change Made</strong> - Reference added.</td>
</tr>
<tr>
<td><strong>Borders</strong> -</td>
<td></td>
</tr>
<tr>
<td>• Where are forward action plans (such as the Otay Mesa-Mesa de Otay Binational Corridor Strategic Plan) related to the Economic Impacts of Border Wait Times study?</td>
<td>• <strong>No Change Made</strong> - Beyond the scope of this monitoring report.</td>
</tr>
<tr>
<td><strong>Interregional Traffic Volumes</strong> -</td>
<td></td>
</tr>
<tr>
<td>• Need a sub-indicator per specific locations; should include SYPOE, including separating vehicles and pedestrians.</td>
<td>• <strong>Change Made</strong> - Data provided; the SYPOE is captured in the Baja California category.</td>
</tr>
<tr>
<td><strong>Border Wait Times</strong> -</td>
<td></td>
</tr>
<tr>
<td>• Need to monitor southbound crossing.</td>
<td>• <strong>No Change Made</strong> - Data not available. Congestion is captured in other indicators.</td>
</tr>
<tr>
<td>Other Comments</td>
<td>Response</td>
</tr>
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<td>----------------</td>
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</tr>
<tr>
<td><strong>Targets</strong> -</td>
<td></td>
</tr>
<tr>
<td>• The Committees need to look at what industry standards are, and/or what other areas are doing to set targets.</td>
<td><strong>No Change Made</strong> – This could be considered in future reports.</td>
</tr>
<tr>
<td>• Specific targets need to be met, and if not, a decision needs to be made as to what is going to be done.</td>
<td><strong>No Change Made</strong> – This could be considered in future reports.</td>
</tr>
<tr>
<td><strong>Report Release</strong> -</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• SANDAG should hold a press conference regarding this report.</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• The timing of this document’s release is very important, particularly close to an election season.</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• The information in the baseline report should be laid out in an executive summary type document, in the context of the strategies of the RCP and RTP.</td>
<td><strong>Comment noted</strong> - Will produce fact sheet.</td>
</tr>
<tr>
<td>• The data included in this report should be posted to SANDAG’s website and updated on a monthly basis.</td>
<td><strong>Comment noted</strong> - Is posted on website.</td>
</tr>
<tr>
<td><strong>Other</strong> -</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• SANDAG is truly good at providing quality information. This report contains a lot of good information.</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• This is a great report with a great format, and is very well done.</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• This is an exciting document that enables comparison as the years go by.</td>
<td><strong>Comment noted.</strong></td>
</tr>
<tr>
<td>• The report is overly optimistic.</td>
<td><strong>Comment noted.</strong></td>
</tr>
</tbody>
</table>
The Final RCP Baseline Monitoring Report can be found at http://www.sandag.org/rcpmonitoring.
Planning Commissioners Lunch Workshop
The ABC’s of Regional Planning in San Diego

Friday January 19th
Lunch Workshop - 11am to 1pm
Sub-regional Roundtable Discussions - 1-2pm (optional)

At
Caltrans District 11 Conference room
4050 Taylor Street
San Diego, CA 92110

A workshop tailored to provide Planning Commissioners, citizen advisory group members, citizen planners and planning staff with important information on San Diego’s regional plans and programs, and how they interact with city and county planning. Optional sub-regional roundtable discussions with regional planning agencies will provide opportunities to discuss specific local regional planning issues. A gourmet boxed lunch & drinks are provided.

Agenda:
11:00am Welcome & introduction to regional planning in San Diego
11:30am First workshop session. Participants choose one of the following four concurrent session topics:
   - Land use and urban form
   - Transportation
   - Regional Public Facilities
   - Natural Environment
12:15pm Second workshop session (same session topics as above)
12:45pm Summary & Q/A
1-2:00pm Four optional geographically defined roundtable discussions of sub-regional planning issues for North County, East County, South County, and Central.

Cost is $25
RSVP by January 15th to lschulte@nctd.org or http://www.sdapa.org

Sponsored by:
### DRAFT SPEAKER LIST

**Regional Planning Technical Working Group**  
**December 14, 2006**

**Friday, January 19, 2007 – Caltrans District 11 Conference Room**

<table>
<thead>
<tr>
<th>Session</th>
<th>Time</th>
<th>Session Detail</th>
<th>Speakers</th>
<th>Topics</th>
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</table>
| Introductions               | 11 to 11:10 a.m.   | Welcome and Lunch Service       | Lance Schulte, APA/NCTD  
Kathleen Garcia, City of San Diego | Welcome and Intros; Why we are here today?  
Importance of reg. context in local decisions  
Planning commissioners' link to regional issues |
|                             | 11:10 to 11:30 a.m.| Introduction to Regional Planning | Bob Leiter, SANDAG                                                      | Regional overview  
RCP and RTP |
| Break-out Session Workshops | 11:30 a.m. to 12 noon | Land Use and Urban Form        | Coleen Clementson, SANDAG  
Sherilyn Sarb, CCC  
Mike Ott, LAFCO | Smart Growth Map, Housing Needs Assessment,  
Economic Prosperity Strategy  
Local coastal programs and land use permits  
Spheres of influence/ annexation/ assessments |
| Workshops                   | 12:15 to 12:45 p.m.| Transportation                 | Dave Schumacher, SANDAG  
Bill Figge, Caltrans  
Angela Shafer-Payne, Airport Authority  
Ralph Hicks, Port of San Diego | RTP, Transportation Project Development  
CMP, RTIPs  
Airport siting, expansion and land use plans  
Freight movement |
|                             |                    | Regional Public Facilities     | Rob Rundle, SANDAG  
Dana Friehauf, County Water Authority  
Susan Freedman, SANDAG (Energy Issues)  
Bruce Posthumus, RWQCB | RCP - Public Facilities Overview  
Regional Water Supply Planning  
Regional Energy Planning and Implementation  
Stormwater management and planning |
|                             |                    | Natural Environment            | Keith Greer, SANDAG  
Andy Hamilton, Air Pollution Control District  
Susan Wynn, US Fish and Wildlife Service  
Shelby Tucker, SANDAG | RCP - Natural Environment Overview  
Regional air quality planning and regulation  
Habitat conservation plans and permits  
Shoreline preservation plans |
| Wrap-up                     | 12:45 to 1 p.m.    | Summary/Q & A                  | Lance Schulte, APA/NCTD;  
Bob Leiter, SANDAG | NA |
## DRAFT SPEAKER LIST

Optional Subregional Roundtable Discussions - 1 to 2 p.m.

<table>
<thead>
<tr>
<th>Topics</th>
<th>North County</th>
<th>Central</th>
<th>East County</th>
<th>South County</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facilitator</strong> and Land Use Resource</td>
<td>Susan Baldwin, SANDAG</td>
<td>Coleen Clementson, SANDAG</td>
<td>Stephan Vance, SANDAG</td>
<td>Carolina Gregor, SANDAG</td>
</tr>
<tr>
<td>Transit Resource</td>
<td>Lance Schulte, NCTD</td>
<td>Conan Cheung, MTS</td>
<td>Phil Trom/Dave Schumacher/ Dan Levy, SANDAG</td>
<td>Mike Daney, MTS</td>
</tr>
<tr>
<td>Transportation Resource</td>
<td>Heather Werdick, SANDAG</td>
<td>Mike Hix, SANDAG</td>
<td>Rachel Kennedy, SANDAG</td>
<td>Elisa Arias, SANDAG</td>
</tr>
<tr>
<td>Port of San Diego Resource</td>
<td>N/A</td>
<td>Dirk Mathiasen, Port of San Diego</td>
<td>N/A</td>
<td>Ralph Hicks, Port of San Diego</td>
</tr>
<tr>
<td>Environment/Public Facilities Resource</td>
<td>Shelby Tucker, SANDAG</td>
<td>Keith Greer, SANDAG</td>
<td>Rob Rundle, SANDAG</td>
<td>Susan Freedman, SANDAG</td>
</tr>
</tbody>
</table>

**Logistical Issues:**

1. Break-out session speakers will be asked to focus on the top two or three key issues that planning commissioners should know about their agencies/projects, keeping presentations to less than five minutes. (PowerPoint presentations are discouraged due to logistics.) Staff members serving as subregional roundtable discussion resources do not need to prepare presentations, as the roundtable discussions will be facilitated discussion sessions.

2. Speakers are encouraged to bring agency “fact sheets” or other materials relevant to their presentations. If these materials are available electronically, they will be posted to the event page on the SDAPA web site.
Ms. Sandy Holder  
Community Development Director  
City of Carlsbad  
1635 Faraday Avenue  
Carlsbad, CA 92008

Dear Ms. Holder:

SUBJECT: Regional Housing Needs Assessment (RHNA) Board Policy No. 033

As you know, on April 28, 2006, the SANDAG Board of Directors adopted Board Policy No. 033 entitled: Implementation Guidelines for SANDAG Regional Housing Needs Assessment Memorandum.

This policy sets forth guidelines for incentives related to the Regional Housing Needs Assessment (RHNA) for the 2005-2010 housing element cycle, which was adopted by the SANDAG Board on February 25, 2005. As part of the approval of the Final RHNA for the San Diego region, the Board agreed to grant certain financial incentives to jurisdictions that provide a greater share of affordable housing now and in the future.

Board Policy No. 033 identifies the funding programs that will be subject to the RHNA policy, the housing element-related eligibility requirements for the funding programs affected by the policy, and how incentive points will be allocated based upon lower income housing production.

I am sending you this letter to remind you about the Board Policy and the eligibility guidelines that jurisdictions will need to meet when applying for the 2008 Transportation Development Act (TDA) and TransNet Bicycle and Pedestrian funds. SANDAG will be sending you a letter in early January with the call for projects for these funds, and applications will be due on February 5, 2007.

In order to be eligible for these funds, prior to the application due date jurisdictions will need to:

1. have adopted a housing element that has been found in compliance with state law by the California Department of Housing and Community Development (HCD) or self-certified (Section 2.4.2 of Policy No. 033);
2. have submitted information regarding the actual production of housing units in all four income categories (very low, low, moderate, and above moderate) (Sections 2.4.3 and 2.4.3.1); and

3. have provided information regarding progress toward complying with any rezoning programs contained in your housing element that are required to meet the adequate site identification requirements of state law (Sections 2.4.3 and 2.4.3.1).

To help you provide this information, we have prepared the attached brief questionnaire (Attachment 1). Board Policy No. 033 also is attached (Attachment 2).

Please let me or Susan Baldwin (619-699-1943) know if you have any questions.

Sincerely,

BOB LEITER
Director of Land Use and Transportation Planning

BL/SB/cd

Attachments:
1. Housing Element and RHNA Production Questionnaire
2. Board Policy No. 033: Implementation Guidelines for SANDAG Regional Housing Needs Assessment Memorandum

cc: Mr. Ray Patchett, City Manager
Mr. Glenn Pruim
Housing Element and RHNA Production Questionnaire
(SANDAG Board Policy No. 33: Implementation Guidelines for SANDAG Regional Housing Needs Assessment (RHNA) Memorandum)
November 21, 2006

1. Has your jurisdiction adopted a housing element that has been found in compliance with state law by the California Department of Housing and Community Development (HCD) or self-certified?
   Yes ☐ No ☐

2. If your answer to Question 1 was “Yes,” please provide the date of adoption and the date of the letter of compliance from HCD, or the date of the self-certification of compliance letter submitted to HCD.

If your answer to Question 1 was “No,” what is the anticipated date of adoption?

3. Please provide the number of new housing units that were constructed during the first year of the housing element cycle (July 1, 2005, to June 30, 2006) by income category. Units reported should have a certificate of occupancy or final inspection.
   a. Number of units affordable to very low income households (<50% AMI):
   b. Number of units affordable to low income households (50-80% AMI):
   c. Number of units affordable to moderate income households (80-120% AMI):
   d. Number of units affordable to above moderate income households (+120% AMI):

4. Does your housing element contain a rezoning program to meet the adequate site identification requirements of state law?
   Yes ☐ No ☐

5. If the answer to Question 4 was “Yes,” please provide information on the progress made toward implementing this program in accordance with the schedule contained in your housing element.
IMPLEMENTATION GUIDELINES FOR SANDAG REGIONAL HOUSING NEEDS ASSESSMENT MEMORANDUM

Purpose

The purpose of this policy is to provide guidelines on the implementation of the memorandum adopted by the SANDAG Board of Directors on February 25, 2005, in association with the adoption of the 2005-2010 Regional Housing Needs Assessment (RHNA) (Attachment 1, referred to herein as the “Memorandum”). The Memorandum laid out specific provisions regarding SANDAG's allocation of discretionary funding to local agency projects in relation to local jurisdiction housing element compliance and lower income housing production.

These implementation guidelines restate the provisions of the Memorandum and define how they will be implemented. The numbered italicized wording in this Policy is taken verbatim from the Memorandum; the implementation guidelines are contained in the text that follows. This policy shall be reviewed and evaluated annually to determine whether changes to the guidelines are needed. Issues to be considered during the annual review include, but are not limited to: lessons learned during the prior year, the relationship between the RHNA memorandum and SANDAG's smart growth goals, and new funding sources proposed to be subject to the memorandum.

Pilot Smart Growth Implementation Program

1. Jurisdictions whose 1999 lower income households as a percentage of total households is estimated to be greater than the regional average shall receive 15 bonus points (out of 100 possible) for projects requesting funding through the Pilot Smart Growth Incentive Program. (This would include National City, El Cajon, Imperial Beach, Lemon Grove, La Mesa, Escondido, Vista, Chula Vista, San Diego, and San Marcos.)

   1.1 This provision of the Memorandum has been implemented. The Pilot Smart Growth Incentive Program criteria, which were approved by the SANDAG Board on April 22, 2005, included the required bonus points for the cities noted above (22 points out of 147 points - 15 percent of the total points awarded).

Future Discretionary Funding Criteria

2. In addition to the current Pilot Smart Growth Incentive Program, for all future discretionary funding allocated to local agency projects by SANDAG (following the adoption by jurisdictions of housing elements for 2005-2010), the following criteria shall apply:

   a. In order to qualify for such funding, a jurisdiction will be required to demonstrate that it is in compliance with provisions of its adopted housing element which set forth their commitment to providing adequate multi-family zoned land or other actions necessary to accommodate their share of lower income housing under the adopted RHNA.
b. Incentive points (a minimum of 25 points out of 100 possible) will be given to projects in jurisdictions in which lower income housing units are being produced in accordance with the housing unit figures contained in Alternative 3.

c. In order to verify compliance with these provisions, each jurisdiction shall annually submit a report to SANDAG indicating its progress in complying with requirements of its housing element, as well as actual production of housing units within its jurisdiction by income category, during the preceding year.

2.1 To implement Items 2.a. - 2.c. of the Memorandum, “discretionary funding allocated to local agency projects by SANDAG” shall be defined as: funds allocated by SANDAG to local jurisdictions (the cities or County) through a competitive process. These funds are listed in Attachment 2 and include the TransNet Smart Growth Incentive Program, Transportation Development Act (TDA) Non-motorized Program, and TransNet Bicycle Program, among others.

2.2 The following types of funding shall not be subject to the provisions of the Memorandum:

2.2.1 Formula funds allocated by population or number of miles, because they are not allocated on a competitive basis.

2.2.2 Discretionary funds allocated to Caltrans, the two transit agencies, and SANDAG because they are not local agencies.

2.2.3 Funds allocated directly by Caltrans to local jurisdictions because SANDAG is not involved in their allocation.

2.2.4 Funds which can be allocated to entities other than local jurisdictions (e.g., TransNet Environmental Mitigation Program Regional Habitat Conservation Fund).

Attachment 3 provides a more detailed list of funding sources/programs that shall not be subject to the Memorandum.

2.3 As new funding sources become available, the Board of Directors shall decide whether they should be subject to the Memorandum and this Policy shall be amended.

2.4 To be eligible to apply for future discretionary funding allocated by SANDAG to local agency projects, local jurisdictions shall do the following:

2.4.1 During the first year of the housing element cycle (July 1, 2005 - June 30, 2006), a jurisdiction shall have submitted a draft of its housing element to HCD or have self-certified its housing element in compliance with state law by the due date for the grant application. This screening criterion shall apply for any discretionary funding programs subject to the Memorandum whose application due date is between July 1, 2005, and December 31, 2006.
2.4.2 Starting January 1, 2007, jurisdictions shall be required to have adopted housing elements (which have been found in compliance with state law by HCD or self-certified). Also, those jurisdictions that were not able to identify adequate sites to meet their RHNA goals and were required to include a program in their housing elements to identify additional sites by rezoning must be able to demonstrate that they are making progress toward implementing the rezoning program in conformance with the schedule contained in their housing elements. "Making progress" toward implementing the rezoning program is defined as having demonstrated a good faith effort in undertaking the rezoning program described in the housing element.

2.4.3 Starting in 2006, jurisdictions shall be required to submit an annual report with the information described in Section 2.4.3.1 below in order to be eligible for funding programs for the following calendar or fiscal year, whichever is applicable. The report must be have been submitted to SANDAG prior to the application due date for the funding source. The first annual reports are due on October 1, 2006, and cover the first year of the 2005-2010 housing element cycle (July 1, 2005 – June 30, 2006). Starting in 2007, the reports will be due on April 1 per Senate Bill 253 (Torlakson), which changed the reporting time frame to the calendar year and the reporting due date to April 1 of each following year.

2.4.3.1 The annual report shall provide information regarding the actual production of housing units by all four income categories (very low, low, moderate, and above moderate). If the report is submitted for the first time in years two, three, four, or five of the housing element cycle, it shall include the total number of units produced by income category during each year of the housing element cycle. The report also shall indicate (if relevant) progress toward complying with any rezoning programs contained in the housing element that are required to meet the adequate site identification requirements of state law (as noted in paragraph 2.4.2 above).

2.5 Memorandum Item 2.b. ties the allocation of funding to the production of lower income housing through the award of incentive points based on the number of lower income housing units produced in accordance with RHNA Alternative 3 (Attachment 4).

2.5.1 Production of lower income housing units will be evaluated and points awarded for each application for discretionary funds based on the percentage of lower income (total very low and low combined) units that were produced in the jurisdiction. The number of lower income units will be calculated for each year on a cumulative basis, and compared to annualized RHNA Alternative 3 numbers. An example of the methodology to calculate the incentive points is shown in Attachment 5. Units shall be counted based on certificates of occupancy or final inspection. Lower income units that were acquired and rehabilitated may only count toward the RHNA Alternative 3 goals when this type of unit was used to meet the site identification requirements for the RHNA numbers as permitted in state law.

Attachments:
1. February 25, 2005, RHNA Memorandum to SANDAG Board of Directors
2. Discretionary Funding Programs Subject to Board RHNA Memorandum
3. Funding Programs Not Subject to Board RHNA Memorandum
4. Final Regional Housing Needs Assessment Modified Alternative 1 (Adopted RHNA) and Alternative 3
5. Hypothetical Example of Allocation of Incentive Points

Adopted April 2006
February 25, 2005

TO: SANDAG Board of Directors

FROM: Mayor Lori Pheiler, Mayor Steve Padilla, and Councilmember Jim Madaffer

SUBJECT: Agenda Item No. 12 – Final Regional Housing Needs Assessment (RHNA)

Our regional housing needs are significant – both now and in the future. Addressing these needs is often a complex process when dealing with the varied interests of the cities in our region. We are committed to doing everything we can to address our regional housing needs. Recognizing the differences between the cities, we are proposing an incentive-based compromise to the RHNA Modified Alternative 1. Simply put, for those cities that are willing and able to accommodate additional housing, those cities should be compensated through incentives that would help improve existing as well as future infrastructure.

We recommend the Board approve Modified Alternative 1, with the following provisions:

1. Jurisdictions whose 1999 lower income households as a percentage of total households is estimated to be greater than the regional average (Attachment 2, Column 1) shall receive 15 bonus points (out of 100 possible) for projects requesting funding through the Pilot Smart Growth Incentive Program. (This would include National City, El Cajon, Imperial Beach, Lemon Grove, La Mesa, Escondido, Vista, Chula Vista, San Diego, and San Marcos.)

2. In addition to the current Pilot Smart Growth Incentive Program, for all future discretionary funding allocated to local agency projects by SANDAG (following the adoption by jurisdictions of housing elements for 2005-2010), the following criteria shall apply:
   a. In order to qualify for such funding, a jurisdiction will be required to demonstrate that they are in compliance with provisions of their adopted housing element which set forth their commitment to providing adequate multi-family zoned land or other actions necessary to accommodate their share of lower income housing under the adopted RHNA.
   b. Incentive points (a minimum of 25 points out of 100 possible) will be given to projects in jurisdictions in which lower income housing units are being produced in accordance with the housing unit figures contained in Alternative 3 (Attachment 2, Column 13).
   c. In order to verify compliance with these provisions, each jurisdiction shall annually submit a report to SANDAG indicating their progress in complying with requirements of their housing element, as well as actual production of housing units within their jurisdiction by income category, during the preceding year.
<table>
<thead>
<tr>
<th>Funding Program</th>
<th>Total Funding</th>
<th>Timeframe Available</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Transportation Enhancements (TE) Program - Pilot Smart Growth Incentive Program</td>
<td>$19.1 M</td>
<td>FY 2006 to FY 2010</td>
</tr>
<tr>
<td></td>
<td>$6.4 M</td>
<td>FY 2010 to FY 2011</td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Transportation Development Act (TDA) Article 3 - Non-motorized Program</td>
<td>$2.4 M</td>
<td>Annual apportionments</td>
</tr>
<tr>
<td></td>
<td>(FY 2006 allocation)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$2.5 M</td>
<td>(FY 2007 allocation)</td>
</tr>
<tr>
<td>Local</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• TransNet Bicycle Program</td>
<td>$3 M</td>
<td>$1 M annually from 2006 to 2008</td>
</tr>
<tr>
<td><strong>Future</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• To be determined (TBD)</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• TBD</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Local</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• TransNet Bicycle, Pedestrian and Neighborhood Safety Program</td>
<td>$280 M*</td>
<td>2009 to 2048</td>
</tr>
<tr>
<td>• TransNet Smart Growth Incentive Program</td>
<td>$285 M*</td>
<td></td>
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<tr>
<td>• TransNet Senior Transportation Mini-grant Program</td>
<td>$73 M*</td>
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</tr>
<tr>
<td>Regional Rail Grade Separation Program</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>(Funding source TBD)</td>
<td>$100 M in Revenue Constrained</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$200 M in MOBILITY 2030 Plan</td>
<td></td>
</tr>
</tbody>
</table>

* In 2002 dollars

---

1. In prior funding cycles, the SANDAG Board of Directors has allocated funding to local jurisdictions through a competitive process for Regional Arterial System, Traffic Signal Optimization, Highway Noise Barrier, Regional Bikeway, and Transportation Enhancements programs. To the extent that such competitive funding programs are made available in the future, they would be subject to the Board RHNA memorandum.
### Attachment 3

#### FUNDING PROGRAMS NOT SUBJECT TO BOARD RHNA MEMORANDUM

<table>
<thead>
<tr>
<th>Current Funding Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Federal</strong>²</td>
</tr>
<tr>
<td>• Regional Surface Transportation Program (RSTP)²</td>
</tr>
<tr>
<td>• Congestion Mitigation &amp; Air Quality (CMAQ)²</td>
</tr>
<tr>
<td>• Transportation Enhancement (TE) Program²</td>
</tr>
<tr>
<td>• Federal Transit Administration (FTA) Urbanized Area Formula Program (Section 5307)</td>
</tr>
<tr>
<td>• FTA Fixed Guideway Modernization Program (Section 5309 Rail Mod)</td>
</tr>
<tr>
<td>• FTA Section 5310 Elderly &amp; Disabled Program</td>
</tr>
<tr>
<td><strong>State</strong>²</td>
</tr>
<tr>
<td>• State Transportation Improvement Program (STIP) – Regional Improvement Program (RIP)²</td>
</tr>
<tr>
<td>• STIP – Interregional Improvement Program (IIP)</td>
</tr>
<tr>
<td>• State Highway Operation and Protection Program (SHOPP)</td>
</tr>
<tr>
<td>• TDA Article 4 – General Public Transit Services (Fixed Transit Route Services)</td>
</tr>
<tr>
<td>• TDA Article 4.5 – Community Transit Service (Accessible Service for the Disabled)</td>
</tr>
<tr>
<td>• TDA Article 8 – Special Provisions (Express Bus and Ferry Services)</td>
</tr>
<tr>
<td>• TDA Planning and Administration</td>
</tr>
<tr>
<td>• State Transit Assistance (STA)</td>
</tr>
<tr>
<td><strong>Local</strong></td>
</tr>
<tr>
<td>• TransNet Highway Program</td>
</tr>
<tr>
<td>• TransNet Transit Program</td>
</tr>
<tr>
<td>• TransNet Local Streets &amp; Roads Program</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Future Funding Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Federal</strong> – same as current programs above</td>
</tr>
<tr>
<td><strong>State</strong> – same as current programs above</td>
</tr>
<tr>
<td><strong>Local</strong></td>
</tr>
<tr>
<td>1. TransNet Congestion Relief Program – Major Transportation Corridor Improvements</td>
</tr>
<tr>
<td>a. Highway &amp; transit capital projects</td>
</tr>
<tr>
<td>b. Operating support for bus rapid transit (BRT) &amp; rail transit capital improvements</td>
</tr>
<tr>
<td>2. TransNet Congestion Relief Program – Transit System Services Improvements &amp; Related Programs</td>
</tr>
<tr>
<td>3. TransNet Congestion Relief Program – Local System Improvements &amp; Related Programs</td>
</tr>
<tr>
<td>a. Local Street &amp; Road Program</td>
</tr>
<tr>
<td>4. Environmental Mitigation Program (EMP)²</td>
</tr>
<tr>
<td>5. TransNet Administration and Independent Taxpayer Oversight Committee (ITOC)</td>
</tr>
</tbody>
</table>

¹ There are a variety of federal and state discretionary funding programs allocated directly by Caltrans that provide funding to local jurisdictions (e.g., Highway Bridge Repair & Replacement [HBRR], Safe Routes to School, etc.). Because SANDAG does not have decision-making authority over these funding programs, they would not be subject to the Board RHNA memorandum.

² With the exception of the EMP funds, these funds (STIP-RIP, RSTP, CMAQ, TE) are being used to match the TransNet Early Action Program (EAP) and other high priority regional projects. If, however, some portion of these funds were allocated by the SANDAG Board of Directors to local jurisdictions through a competitive process, they would be subject to the Board RHNA memorandum and this policy.
### Final Regional Housing Needs Assessment
Modified Alternative 1 (Adopted RHNA) and Alternative 3

<table>
<thead>
<tr>
<th>Regional Share</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carlsbad</td>
<td>8,376</td>
<td>1,922</td>
<td>1,460</td>
<td>1,583</td>
<td>3,411</td>
<td>2,506</td>
<td>1,816</td>
<td>1,583</td>
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<tr>
<td>Chula Vista</td>
<td>17,224</td>
<td>3,875</td>
<td>2,945</td>
<td>3,255</td>
<td>7,148</td>
<td>3,730</td>
<td>2,592</td>
<td>3,255</td>
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<tr>
<td>Coronado</td>
<td>64</td>
<td>14</td>
<td>11</td>
<td>12</td>
<td>27</td>
<td>20</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Del Mar</td>
<td>25</td>
<td>6</td>
<td>4</td>
<td>5</td>
<td>10</td>
<td>7</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>El Cajon</td>
<td>621</td>
<td>86</td>
<td>75</td>
<td>117</td>
<td>343</td>
<td>86</td>
<td>75</td>
<td>117</td>
</tr>
<tr>
<td>Encinitas</td>
<td>1,712</td>
<td>392</td>
<td>299</td>
<td>324</td>
<td>697</td>
<td>502</td>
<td>373</td>
<td>324</td>
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<tr>
<td>Escondido</td>
<td>2,437</td>
<td>548</td>
<td>417</td>
<td>461</td>
<td>1,011</td>
<td>486</td>
<td>359</td>
<td>461</td>
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<tr>
<td>Imperial Beach</td>
<td>87</td>
<td>13</td>
<td>9</td>
<td>16</td>
<td>49</td>
<td>13</td>
<td>9</td>
<td>16</td>
</tr>
<tr>
<td>La Mesa</td>
<td>396</td>
<td>89</td>
<td>68</td>
<td>75</td>
<td>164</td>
<td>79</td>
<td>56</td>
<td>75</td>
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<tr>
<td>Lemon Grove</td>
<td>242</td>
<td>46</td>
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<td>46</td>
<td>118</td>
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<td>46</td>
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<tr>
<td>National City</td>
<td>319</td>
<td>18</td>
<td>39</td>
<td>60</td>
<td>202</td>
<td>18</td>
<td>39</td>
<td>60</td>
</tr>
<tr>
<td>Oceanside</td>
<td>6,423</td>
<td>1,445</td>
<td>1,098</td>
<td>1,214</td>
<td>2,666</td>
<td>1,454</td>
<td>1,042</td>
<td>1,214</td>
</tr>
<tr>
<td>Poway</td>
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<td>285</td>
<td>216</td>
<td>235</td>
<td>505</td>
<td>419</td>
<td>288</td>
<td>235</td>
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<tr>
<td>San Diego - Original</td>
<td>45,741</td>
<td>10,292</td>
<td>7,822</td>
<td>8,645</td>
<td>18,983</td>
<td>9,195</td>
<td>7,834</td>
<td>8,645</td>
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</table>

<table>
<thead>
<tr>
<th>Units to/from Unincorporated Area</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego - Revised*</td>
<td>45,741</td>
<td>353</td>
<td>268</td>
<td>0</td>
<td>(621)</td>
<td>418</td>
<td>292</td>
<td>0</td>
</tr>
<tr>
<td>San Diego - Original</td>
<td>10,645</td>
<td>8,090</td>
<td>8,645</td>
<td>18,362</td>
<td>9,613</td>
<td>8,126</td>
<td>8,645</td>
<td>19,358</td>
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<tr>
<td>San Marcos</td>
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<td>1,407</td>
<td>1,069</td>
<td>1,182</td>
<td>2,595</td>
<td>1,434</td>
<td>966</td>
<td>1,182</td>
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<tr>
<td>Santee</td>
<td>1,381</td>
<td>317</td>
<td>241</td>
<td>261</td>
<td>562</td>
<td>384</td>
<td>261</td>
<td>261</td>
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<tr>
<td>Solana Beach</td>
<td>131</td>
<td>30</td>
<td>22</td>
<td>25</td>
<td>53</td>
<td>37</td>
<td>30</td>
<td>25</td>
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<tr>
<td>Vista</td>
<td>2,267</td>
<td>510</td>
<td>388</td>
<td>428</td>
<td>941</td>
<td>511</td>
<td>305</td>
<td>428</td>
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<tr>
<td>Unincorporated Area - Original</td>
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<td>2,781</td>
<td>2,113</td>
<td>2,336</td>
<td>5,129</td>
<td>3,217</td>
<td>2,251</td>
<td>2,336</td>
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</table>

<table>
<thead>
<tr>
<th>Units to/from Unincorporated Area</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unincorporated Area - Revised*</td>
<td>(353)</td>
<td>(268)</td>
<td>0</td>
<td>621</td>
<td>(418)</td>
<td>(292)</td>
<td>0</td>
<td>709</td>
</tr>
<tr>
<td>San Diego Region</td>
<td>107,301</td>
<td>24,143</td>
<td>18,348</td>
<td>20,280</td>
<td>44,530</td>
<td>24,144</td>
<td>18,348</td>
<td>20,280</td>
</tr>
</tbody>
</table>

Note: Some jurisdiction allocations by income category were adjusted slightly to ensure that regional income category percentages provided by the California Department of Housing and Community Development (HCD) -- 22.5 percent very low income, 17.1 percent low income, 18.9 percent moderate income, and 41.5 percent above moderate income -- were met.

*Adjusted to reflect transfer of lower income units from Unincorporated Area to City of San Diego.

**Modified Alternative 1 was approved by the SANDAG Board on February 25, 2005.

***Alternative 3 is referenced in the memorandum approved by the SANDAG Board in conjunction with the approval of the Final RHNA.

Totals may be affected by rounding.

March 18, 2005
## Example
### Hypothetical Allocation of Incentive Points

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Alt. 3 – Low/ Very Low Income Units*</th>
<th>Annual Number Year 1</th>
<th>Number Produced Year 1**</th>
<th>Percentage of Alt. 3 Year 1**</th>
<th>Incentive Points**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carlsbad</td>
<td>4,322</td>
<td>864</td>
<td>300</td>
<td>35%</td>
<td>9</td>
</tr>
<tr>
<td>Chula Vista</td>
<td>6,322</td>
<td>1,264</td>
<td>632</td>
<td>50%</td>
<td>13</td>
</tr>
<tr>
<td>Escondido</td>
<td>845</td>
<td>169</td>
<td>127</td>
<td>75%</td>
<td>19</td>
</tr>
<tr>
<td>Imperial Beach</td>
<td>22</td>
<td>4</td>
<td>4</td>
<td>100%</td>
<td>25</td>
</tr>
<tr>
<td>San Diego</td>
<td>17,739</td>
<td>3,548</td>
<td>1,419</td>
<td>40%</td>
<td>10</td>
</tr>
<tr>
<td>San Marcos</td>
<td>2,400</td>
<td>480</td>
<td>288</td>
<td>60%</td>
<td>15</td>
</tr>
<tr>
<td>Unincorporated County</td>
<td>4,758</td>
<td>952</td>
<td>400</td>
<td>42%</td>
<td>11</td>
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</table>

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Alt. 3 – Low/ Very Low Income Units</th>
<th>Cum. Annual Number Year 2</th>
<th>Cum. Number Produced Year 2**</th>
<th>Percentage of Alt. 3 Cum. Year 2**</th>
<th>Incentive Points Year 2**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carlsbad</td>
<td>4,322</td>
<td>1,728</td>
<td>400</td>
<td>23%</td>
<td>6</td>
</tr>
<tr>
<td>Chula Vista</td>
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<td>2,528</td>
<td>832</td>
<td>33%</td>
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</tr>
<tr>
<td>Escondido</td>
<td>845</td>
<td>338</td>
<td>253</td>
<td>75%</td>
<td>19</td>
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<tr>
<td>Imperial Beach</td>
<td>22</td>
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<td>22</td>
<td>275%</td>
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</tr>
<tr>
<td>San Diego</td>
<td>17,739</td>
<td>7,096</td>
<td>3,500</td>
<td>49%</td>
<td>12</td>
</tr>
<tr>
<td>San Marcos</td>
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<td>960</td>
<td>960</td>
<td>100%</td>
<td>25</td>
</tr>
<tr>
<td>Unincorporated County</td>
<td>4,758</td>
<td>1,904</td>
<td>500</td>
<td>28%</td>
<td>7</td>
</tr>
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</table>

*7.5 year number in RHNA Alternative 3 may be modified based on 5-year number included in local housing elements.

**These percentages and numbers are hypothetical for the purpose of explaining the methodology.
2007 REGIONAL TRANSPORTATION PLAN: PROPOSED TRANSIT STRATEGY FOR 2030 UNCONSTRAINED NETWORK  File Numbers 3005200, 3000400

Introduction

At its December 8, 2006 meeting, the Transportation Committee discussed the Proposed Transit Strategy for the 2007 Regional Transportation Plan. Staff will present an overview of the agenda item (attached) and the action taken by the Transportation Committee.

Attachment: 1. Transportation Committee Agenda dated December 8, 2006

Key Staff Contact: Dave Schumacher, (619) 699-6906, dsc@sandag.org
2007 REGIONAL TRANSPORTATION PLAN: PROPOSED TRANSIT STRATEGY FOR 2030 UNCONSTRAINED NETWORK

File Numbers 3005200, 3000400

Introduction

On July 21, 2006, the Transportation Committee reviewed several initial transit scenario concepts under consideration for the 2007 Regional Transportation Plan (RTP). Four alternative transit scenario concepts were evaluated, including: an update to the current Unconstrained Plan in MOBILITY 2030, two alternative Managed Lanes strategies, and a transit corridor guideway network (detailed in Attachment 1). This effort provided a sketch planning exercise testing how differing strategies affect the regional transportation system, with the specific aim of maximizing the effectiveness of the regional transit network in addressing regional mobility needs.

This agenda item provides a discussion and comparison of the transit scenario concepts evaluated. Several conclusions are drawn from the results that form the basis of the recommended transit strategy:

- Focusing transit improvements within the urban core areas that contain transit supportive land uses, including development of a system of arterial rapid bus services (limited-stop service with transit priority measures);
- Emphasizing peak commute period mobility to key regional employment centers;
- Continuing the current multimodal Managed Lanes strategy; and
- Further study of possible transit guideways in several corridors.

The next step will be to use the transit strategy to develop the transit network and services in the Unconstrained Plan for the 2007 RTP. The Unconstrained Plan will define the region’s vision of the cost-effective highway and transit improvements necessary to serve regional travel demand in 2030. The 2007 RTP will strive to implement as much of the Unconstrained Plan as possible given available resources. The draft Unconstrained Network for the 2007 RTP is scheduled for presentation at the January 19, 2007, Transportation Committee meeting.

Discussion

The regional transit system is an integral part of the multimodal approach of MOBILITY 2030, the RTP adopted in 2003. Having an effective system of commuter rail, light rail, bus rapid transit (BRT), arterial rapid bus, local bus, and shuttle services that complements the local road and freeway
A transit system is critical to the goal of maximizing the person-carrying capacity of the overall transportation network. The benefits gained are not just to transit users, but to auto users as well. An improved transit system provides more travel choices for everyone, and the resulting increase in transit usage in key travel corridors translates into less demand on the highway network.

The recently completed Independent Transit Planning Review (ITPR) report included recommendations on possible strategies for improving the role of public transportation. These recommendations were used to develop the various transit scenarios designed to explore how best to maximize the effectiveness and efficiency of the regional transit system. As such, this effort was a “sketch planning exercise” to provide useful input on potential revisions to the transit network for the 2007 RTP.

**Results from Transit Scenario Concept Evaluation**

Staff developed a set of transit scenario concepts to test how different strategic approaches to the design and operation of the transit network compare with one another. While the focus of these scenario concepts is on the regional transit network, it is important to note that each scenario assumed a concurrent investment in roadway improvements, most notably in the current Managed Lanes/High Occupancy Vehicle (HOV) Lanes strategy contained in the MOBILITY 2030.

A detailed discussion of the evaluation results is provided in Attachment 1, with a comparison of the key transit and highway volumes numbers provided in Attachment 2. A comparison of travel times in several freeway corridors is currently being finalized and will be presented at the Transportation Committee meeting. Below is a summary of key highlights:

**Scenario Concept #1 – MOBILITY 2030: Updated Unconstrained Plan**

This scenario represented an updated version of the Unconstrained Plan in MOBILITY 2030 and served as a benchmark for comparison with the other scenarios.

- Focus on high-frequency service in urban core areas results in nearly a doubling of transit ridership over current levels.

- Introduction of a network of arterial rapid services (limited-stops with low-cost transit priority measures) strengthens ridership in key arterial corridors.

- Success of these transit improvements dependent on Regional Comprehensive Plan strategic initiatives on smart growth, urban design, and parking management.

**Scenario Concept #2 – Alternative Managed Lanes Strategy: Very High Occupancy Vehicles**

This scenario represented an alternative Managed Lanes strategy of increasing the carpool/vanpool vehicle occupancy requirement from 2+ to 3+ persons and creation of in-line BRT station designs.

- Changing the vehicle occupancy requirement leads to minimal increase in transit ridership, while likely having a negative impact on carpool usage in Managed Lanes and congestion/travel times in the general purpose lanes.

- Introduction of in-line station design is expected to increase BRT ridership.
Scenario Concept #3 – Alternative Managed Lanes Strategy: Freeway Transitways

This scenario represents an alternative Managed Lanes strategy of dedicating two of the four lanes on the I-15 and I-805 facilities to “transit only” lanes.

- Introduction of transit only lanes leads to minimal increase in transit ridership.
- Reduced Managed Lanes capacity likely to have negative impact on both carpool/vanpool usage and congestion/travel times in general purpose lanes.

Scenario Concept #4 – Transit Corridor Guideways

This scenario evaluated a dedicated transit corridor guideway network in both freeway and nonfreeway corridors (see Attachment 3).

- Creation of guideway network leads to modest increase in regional transit ridership; most of guideway BRT ridership is diverted from rail and arterial rapid bus services.
- Implementation of transit guideways in non-Managed Lanes corridors (Downtown-Kearny Mesa and University City/UCSD/Sorrento Mesa) show strong ridership potential.

Scenario Concept #5 – Downtown/Urban Core Focus

The original aim of this deleted scenario was a focus transit service in the urban core areas. In developing the networks for the scenarios, a strong focus on the urban core areas was already built into the other four scenarios. Results from the other four scenarios show strong peak, home-to-work transit mode shares for downtown San Diego and moderate mode shares for other downtown and regional employment areas.

**Transportation Model Accuracy**

The Transportation Committee had previously requested information on the accuracy of the SANDAG transportation model in forecasting transit ridership. Attachment 4 presents a short report outlining how observed data has compared with past forecasts. Overall, the model has done a good job in forecasting transit patronage, with error rates well below those often associated with long range forecasts.

**Conclusions and Recommendation**

The results of the analysis show that the MOBILITY 2030: Updated Unconstrained Plan scenario shows a significant growth in future transit ridership over today’s ridership levels. A key reason is the addition of the two new elements to the Unconstrained Plan: a focus of transit improvements within the urban core areas and the addition of arterial rapid bus services. In addition, selected transit guideway facilities also show promise for benefiting Bus Rapid Transit, arterial rapid bus, and local bus services in key travel corridors. On the other hand, the analysis of two alternative Managed Lanes scenario concepts shows little benefit to transit and negative impacts to the highway system. The end result is an affirmation of the current multimodal Managed Lanes strategy that provides benefits to BRT services along with carpool/vanpools and FasTrak users. Finally, improvements to services during the peak commute period can result in transit playing an increased role in serving mobility needs to key employment areas.

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Based on these conclusions, the table below summarizes the various concepts from each scenario both recommended and not recommended for inclusion in the 2007 RTP transit strategy.

<table>
<thead>
<tr>
<th>Transit Scenario</th>
<th>Recommended for RTP Transit Strategy</th>
<th>Not Recommended for RTP Transit Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOBILITY 2030: Updated Unconstrained Plan</td>
<td>• High frequency urban core services&lt;br&gt; • Arterial rapid services&lt;br&gt; • Maximize peak mode split to downtowns &amp; employment centers through additional services</td>
<td></td>
</tr>
<tr>
<td>Alternative Managed Lanes – Very High Occupancy Vehicles</td>
<td>• Retain Managed Lanes/HOV facilities 2+ carpool/vanpool requirement&lt;br&gt; • Evaluate in-line station design for Managed Lane facilities</td>
<td>• Do not pursue Managed Lanes/HOV facilities 3+ carpool/vanpool requirement</td>
</tr>
<tr>
<td>Alternative Managed Lanes - Freeway Transitways</td>
<td>• Retain multimodal use of Managed Lanes facilities</td>
<td>• Do not pursue dedicated lanes for transit separated from lanes for HOV/FasTrak users</td>
</tr>
<tr>
<td>Transit Corridor Guideways</td>
<td>• Guideways for Downtown-Kearny Mesa &amp; UTC-Sorrento Mesa areas</td>
<td></td>
</tr>
</tbody>
</table>

The recommended action today is to approve a transit strategy for development of the transit network for the 2007 RTP. This strategy represents a hybrid of the MOBILITY 2030: Updated Unconstrained Plan and Transit Guideway scenario concepts. More specifically, this strategy would encompass the following six key elements:

1. A rich network of transit services focused on the region’s urban core areas where transit-supportive land uses create the potential for attracting strong transit usage, including:
   a. High frequency all-day service (10 minutes or better) on local bus services, and
   b. The addition of an arterial rapid bus system in key corridors aimed at creating higher-speed, limited-stop services;

2. A network of local and selected arterial rapid bus services in suburban areas that emphasize connectivity between regional destinations, but with service levels determined by demand;

3. An emphasis on maximizing transit mode share to key regional employment areas for peak commute tripmaking;

4. An investment in transit priority capital improvements and station designs needed to provide high-speed, reliable transit services:
   a. Continuation of the multimodal Managed Lanes strategy that provides priority treatment for freeway bus rapid transit services (along with carpools);
   b. Further evaluation of in-line BRT station design for Managed Lanes facilities;
   c. Extensive use of low-cost arterial transit priority treatments (signal priority, queue jump lanes) for local and arterial rapid bus services;
5. Further evaluation of dedicated transit guideways in the 4th/5th/6th Avenue/SR 163 corridor between downtown and Kearny Mesa, and in the University City/Sorrento Mesa areas.

6. Pursue the strategic initiatives outlined in the Regional Comprehensive Plan (e.g. smart growth development patterns, urban design, parking management strategies) that are integral components for the success of the RTP transit plan.

Next Steps

Based on the Transportation Committee’s recommendation on the 2007 RTP transit strategy, the next step is to create a Preliminary Unconstrained Transit Network that incorporates the results of the transit scenario evaluation. We will continue to work with Metropolitan Transit System and North County Transit District staff in this effort. This preliminary transit network will then be combined with an updated highway network to evaluate any transit routes or services that do not merit further consideration in the overall RTP Unconstrained Network. As we develop the unconstrained transit and highway networks, we will compare it with the MOBILITY 2030 networks to understand where changes are proposed. The resulting draft Unconstrained Network for the 2007 RTP is scheduled for presentation to the Transportation Committee at its January 19, 2007, meeting.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments: 1. Transit Scenario Concepts Evaluation Results
   2. Transit Scenario Results Table
   3. Transit Guideway Scenario Map
   4. Transportation Model Accuracy Report

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Transit Scenario Concepts Evaluation Results

The following initial transit scenario concepts were evaluated for use in the development of a transit strategy for the 2007 Regional Transportation Plan (RTP).

Scenario Concept #1 – MOBILITY 2030: Updated Unconstrained Plan

This scenario represents an updated version of the current unconstrained plan in MOBILITY 2030 and served as a benchmark for comparison with the alternative scenarios outlined below. This alternative included both the highway and transit networks in the MOBILITY 2030 Unconstrained Plan, updated to reflect changes in the transit systems of the two transit agencies, including the Metropolitan Transit System (MTS) Comprehensive Operational Analysis (COA) that is now being implemented and the Fast Forward plan implemented by the North County Transit District (NCTD). This update included evaluation of a network of limited-stop, arterial rapid bus services (using transit priority measures such as signal priority treatments and queue jump lanes) in addition to the freeway-based Bus Rapid Transit contained in MOBILITY 2030.

The focus of increased transit service (10 minute all-day frequencies on most routes) in the urban core areas that have stronger transit-supportive land uses than suburban areas results in a regional daily ridership of nearly 600,000, nearly doubling current levels (317,000). The introduction of arterial rapid services (limited-stop routes utilizing low-capital cost transit priority treatments) as an overlay to local bus service show the potential for strong ridership increases in key arterial corridors. Tested in 13 corridors throughout the region, these routes generated a five percent increase in ridership versus a network without rapid bus services. Several individual corridors show increases exceeding 50 percent. This focus on the urban core areas and the introduction of arterial rapid services are consistent with the recent COA conducted by MTS and the NCTD Fast Forward plan.

The Regional Comprehensive Plan (RCP) strategic initiatives promote smart growth strategies, pedestrian-oriented urban designs, and parking management strategies. These will play an important role in ensuring the success of transit improvements outlined in this scenario.

Scenario Concept #2 – Alternative Managed Lanes Strategy: Very High Occupancy Vehicles

The MOBILITY 2030 Managed Lanes strategy is based on a multimodal approach to maximize person throughput by giving priority to higher-occupancy carpool/vanpool (2+ person requirement), and BRT vehicles. Any excess capacity is assumed to be available to solo drivers for a fee through the Fastrak program. Using the revised unconstrained highway and transit network plan above, this alternative scenario tested a strategy that emphasized very high occupancy vehicles (3+ person carpools/vanpools, and BRT) to determine if it offers the potential to achieve a higher person-throughput. This scenario also developed an in-line station design to minimize transit travel times. The arterial rapid bus services and arterial priority measures developed in Scenario #1 are also included.
The results show minimal increases in transit ridership. Peak ridership regionally increases three percent in the peak over Scenario Concept #1, with ridership on routes within the Managed Lanes corridors increasing only three percent during the peak. These small increases, combined with the expected decline in carpools, indicate that the Managed Lanes would not show a significant increase in alternative mode usage (transit and carpools/vanpools) versus the current 2+ person occupancy requirement (Scenario Concept #1). Conversely, while some two-person carpools may shift to the general purpose lanes, many would likely shift to driving alone since they no longer would have the travel time savings afforded in the Managed Lanes. The resultant increase in general purpose traffic also would be expected to increase peak travel times. A comparison of travel times in several freeway corridors is currently being finalized and will be presented at the Transportation Committee meeting. This alternative also included evaluation of in-line BRT station designs for Managed Lanes facilities that minimizes the out-of-direction travel associated with the I-15 Managed Lane facility. While the results did not allow us to directly attribute any ridership gains specifically to this in-line station design, the reduced travel times for BRT routes should have a positive impact.

Scenario Concept #3 - Alternative Managed Lanes Strategy: Freeway Transitways

This scenario is similar to Scenario Concept #2 in terms of testing an alternative strategy for the Managed Lanes facilities to maximize person-throughput; however, in this case, the strategy involved dedicating two of the four Managed Lanes to transit only. A dedicated transitway provides a facility design that maximizes transit speeds and access. The remaining lanes would be priority access for 2+ carpools/vanpools.

This scenario shows similar results to Scenario Concept #2. Transit ridership increases only three percent in the peak regionally over Scenario Concept #1, with ridership somewhat higher on routes that would benefit directly from the dedicated transit lanes (five percent in the peak). Dedicating two of the four managed lanes would likely have a negative impact on carpool/vanpool usage (and FasTrak® usage as well) since there would be only 50 percent as much capacity to handle demand. As with Scenario Concept #2, the result would be increased traffic in the general purpose lanes. A comparison of travel times in several freeway corridors is currently being finalized and will be presented at the Transportation Committee meeting.

Scenario Concept #4 – Transit Corridor Guideways

This alternative built off the approach in Scenario Concept #3 regarding dedicated transit lanes in Managed Lanes corridors by expanding the concept of dedicated transit facilities to areas outside the freeway corridors where warranted based on travel demand and opportunities for land use integration. Transit investment would be focused in guideways that can best connect major demand origins and destinations in a way that maximizes transit system connectivity, community access to the system, and transit travel speeds. Transit guideways, either fully grade-separated or with at-grade crossings, offer the flexibility to operate an array of BRT services and facilitate operations of local bus services as well. The network is based on travel demand and input from the Independent Transit Peer Review panel.

Several of the guideways are in corridors where Managed Lanes facilities are planned. Since the Managed Lanes facilities are designed for carpools/vanpools and FasTrak users, they are included in this scenario, while all BRT routes that used the Managed Lanes facilities in the previous scenarios have been re-routed to the transit guideways. In addition to transit guideways in the I-15 and I-805
Managed Lanes corridors, transit guideways were also tested in the 4th/5th Avenue/SR 163 corridor between downtown and Kearny Mesa and the University City/UCSD/Sorrento Mesa areas. Since the Managed Lanes facilities are designed for carpools/vanpools and FasTrak users, they are included in this scenario; all BRT routes that used the Managed Lanes facilities in the previous scenarios have been re-routed to the transit guideways.

The results from this scenario indicate that the BRT routes using the transit guideways show a 115 percent daily ridership increase, indicating that the guideways do attract strong usage. However, on a regional basis, the transit guideways only result in a seven percent ridership increase. The reason for this difference is the fact that non-BRT transit modes (light rail, commuter rail, arterial rapid) show ridership decreases, implying that most of the BRT ridership comes from a shift of existing riders rather than from new riders to transit. A look at individual transit guideway segments reveals that the Downtown-Kearny Mesa and University City-Sorrento Mesa segments do show sizeable ridership increases (58 percent and 21 percent, respectively, for routes along those segments). While grade-separated transitways represent major capital investments, such an investment in these corridors offer the potential of significant benefits to the transit system.

Scenario Concept #5 – Downtown/Urban Core Focus

The original aim of this deleted scenario was a focus transit service in the urban core areas. In developing the networks for the scenarios, a strong focus on the urban core areas and the various downtowns and key employment areas in the region (downtown San Diego, University City/UCSD, Sorrento Mesa, Kearny Mesa, Escondido, and Chula Vista) was already built into the other four scenarios. Thus, while a specific downtown/urban core scenario was not modeled, it was possible to evaluate how well these areas were served by each of the other four scenario concepts.

The results show that peak, home-to-work transit mode splits would range from 38 percent to 41 percent for downtown San Diego, representing a significant increase over the 30 percent in MOBILITY 2030. Peak, home-to-work transit mode splits for other areas range from 4.2-7.9 percent for Sorrento Mesa to 13.2-17.9 percent for University City. Regionally, the peak, home-to-work mode share for transit ranges from 8.6-9.6 percent, nearly achieving the 10 percent goal of MOBILITY 2030.

As noted in the July 16, 2006, agenda item, the downtown/urban core focus may address concerns raised by Save Our Forests and Ranchlands (SOFAR). With the adoption of MOBILITY 2030, SOFAR challenged the adequacy of the Environmental Impact Report (EIR) that was certified by the SANDAG Board. To address the concerns raised by SOFAR, SANDAG entered into a settlement agreement that requires SANDAG to analyze an alternative in the EIR of the 2007 RTP that addresses increased transit in the region. SOFAR has subsequently requested that SANDAG analyze a different alternative than what was outlined in the settlement agreement that would focus additional transit in the downtown San Diego core. While no action is recommended today regarding SOFAR’s concerns, discussions are continuing regarding these scenarios.
Transit Scenario Evaluation Results

<table>
<thead>
<tr>
<th>Person Trips</th>
<th>2006 Daily Regional Ridership*</th>
<th>Scenario #1 Mobility 2030: Updated Unconstrained Plan</th>
<th>Scenario #2 Alternative ML - 3+ Carpool</th>
<th>Scenario #3 Alternative ML - Transit Lanes</th>
<th>Scenario #4 Transit Corridor Guideways</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>---</td>
<td>21,830,000</td>
<td>21,830,000</td>
<td>21,830,000</td>
<td>21,830,000</td>
</tr>
</tbody>
</table>

Transit Trips**

- Total: 317,000 598,000 611,000 612,000 639,000
- Light/Commuter Rail: 112,000 222,000 228,000 228,000 209,000
- Bus Rapid Transit: --- 59,000 60,000 60,000 128,000
- Arterial Rapid Bus: --- 83,000 84,000 84,000 63,000
- Local Bus: 205,000 234,000 239,000 240,000 239,000

Transit Mode Shares (All Day, Peak Home-Work)

- Downtown San Diego: 11.9%, 38.4% 12.0%, 39.3% 12.0%, 39.5% 12.6%, 41.2%
- Chula Vista Downtown: --- 2.1%, 8.8% 2.1%, 10.2% 2.1%, 10.2% 2.1%, 10.2%
- Kearny Mesa: --- 2.6%, 7.9% 2.7%, 8.7% 2.7%, 8.8% 3.6%, 11.3%
- University City/UCSD: --- 4.3%, 13.2% 4.5%, 15.0% 4.5%, 15.2% 4.9%, 16.7%
- Sorrento Mesa: --- 1.6%, 4.2% 1.7%, 5.3% 1.7%, 5.5% 2.3%, 7.9%
- Escondido: All Day: --- 1.6%, 8.3% 1.6%, 9.1% 1.6%, 9.0% 1.6%, 9.2%
- Regional: --- 1.8%, 8.6% 1.8%, 8.8% 1.8%, 8.8% 1.9%, 9.6%

Peak Travel Time Comparisons

- South Bay to UTC: To be provided at Transportation Committee meeting
- Escondido to Downtown: To be provided at Transportation Committee meeting
- El Cajon to Kearny Mesa: To be provided at Transportation Committee meeting

* - Source: SANDAG Passenger Counting Program
** - Unlinked trips
Transit Scenario #4
Transit Corridor
Guideways
November 2006

Transit Corridor
Guideways

METRO
MILES
0
0
KILOMETERS
0
4.83

SANDAG
Transportation Model Accuracy Report
(prepared by SANDAG’s Technical Services Department)

This agenda item presents 2030 transit ridership forecasts that could be expected under different transit scenarios. These forecasts were produced by SANDAG’s transportation models, which are made up of complex relationships between demographic factors and the quality of service offered by highway and public transportation systems. The question often arises as to how accurate the models have been in forecasting transit usage.

One way to assess model accuracy is to look at past Regional Transportation Plans (RTPs). Since 1980 SANDAG has produced a new RTP every three to five years. Base year, near term, and long term regional transit trip forecasts are published at the end of each RTP. By now some of these forecast years have been reached, so that forecasted transit ridership can be compared with observed transit ridership collected through SANDAG’s Passenger Counting Program.

The following table shows that four of the five RTP transit forecasts have been very accurate. The most significant difference between actual and model-estimated ridership occurred with the 1989 RTP. This error can be primarily traced to overly optimistic assumptions about construction schedules for light rail extensions made shortly after the first TransNet Ordinance was passed.

### Comparison of Observed and Forecasted Daily Regional Transit Trips
**1980 to 2000 Regional Transportation Plans**

<table>
<thead>
<tr>
<th>RTP</th>
<th>Forecast Year</th>
<th>Observed Trips</th>
<th>Forecasted Trips</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>2000</td>
<td>242,400</td>
<td>225,400</td>
<td>-7%</td>
</tr>
<tr>
<td>1986</td>
<td>2005</td>
<td>225,000</td>
<td>274,500</td>
<td>22%</td>
</tr>
<tr>
<td>1989</td>
<td>2005</td>
<td>225,000</td>
<td>339,700</td>
<td>51%</td>
</tr>
<tr>
<td>1994</td>
<td>2005</td>
<td>225,000</td>
<td>254,600</td>
<td>13%</td>
</tr>
<tr>
<td>2000</td>
<td>2005</td>
<td>225,000</td>
<td>231,900</td>
<td>3%</td>
</tr>
</tbody>
</table>

Another method of assessing model accuracy is to evaluate the project-specific ridership forecasts that were used to justify the construction of transit improvements. Only a limited number of these studies have been done. The following summary shows close agreement between projected and actual ridership for most studies.

- **Blue Line** The first light rail forecast was a 1978 projection of 11,000 daily boardings on the Blue Line between San Ysidro and Downtown San Diego for the year 1981. Actual 1981 boardings were 10,000 and currently there are over 50,000 boardings on this light rail segment.

- **Orange Line** The next study, conducted in 1985, forecasted 14,800 daily boardings would occur on the Orange Line extension between the Twelfth/Imperial Station and Santee in the year 2000. In 2000 the 16,000 actual boardings on this segment were within 8% of the forecast.

- **Coaster** A 1989 study of proposed Coaster service forecasted 4,000 daily boardings in the 1995 opening year. Actual opening year ridership came in lower than expected with 2,200 boardings, but quickly grew to expected levels by 1999. Current Coaster usage of 6,000 daily riders exceeds projections.
• **Mission Valley West.** A 1991 study of the Blue Line extension from Old Town to Mission San Diego was most problematic. This study projected 16,300 boardings on the Mission Valley West extension in 1995 but 5,600 actually materialized. Factors contributing to the overestimated ridership include the assumed redevelopment of the Riverwalk Golf Course that has been delayed and feeder bus service that was provided at lower levels than anticipated.

• **Mission Valley East.** A 1995 study of the Blue Line extension from Mission San Diego to Grossmont was the last study of a proposed rail project that has since come online. A long range 2015 forecast of 7,400 daily riders was produced for this light rail segment. Current usage for the four new stations stands at 4,900 daily boardings. Given expected ridership increases over the next 10 years, actual ridership by 2015 should agree closely with the 1995 forecast.

Overall, the model has done a good job in forecasting transit patronage, with error rates well below those often associated with long range forecasts. In those cases where model forecasts have been most problematic, model inputs are usually at fault rather than the model structure itself.

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INTRODUCTION

SANDAG has identified several key components to be developed for the 2007 RTP for which staff has prepared white papers to generate discussion and gather input from SANDAG working groups. The energy white paper addresses energy and climate change impacts associated with transportation, discusses alternative fuel and vehicle considerations, and outlines potential energy-saving and emission-reducing measures. Issues identified in the 2007 RTP will be addressed further through an update of the Regional Energy Strategy (RES) (adopted in 2003).

DISCUSSION

This white paper identifies energy issues related to the use of transportation fuels and transportation activities. Focal areas include alternative fuel and vehicle program options, ways to reduce fuel demand and associated emissions through integrated land use and transportation planning, and recognition of climate change effects from transportation and mitigation options. The paper recommends that the RTP 2007 showcase plan components that inherently save energy and reduce emissions such as congestion reduction measures, demand reduction measures, and smart growth. It further recommends that the plan identify existing alternative fuel and alternative vehicle measures and propose suitable programs for the San Diego region.

Subsequent to the adoption of MOBILITY 2030, California has undergone significant changes in law and mandate regarding climate change. The white paper recommends that the 2007 RTP include greenhouse gas emission impacts and reductions from various travel choices and from smart growth efforts, enhance the energy component of the plan’s Environmental Impact Report to recognize and explain the projected effects of greenhouse gases, and identify an action plan and possible funding sources to further address climate change effects of transportation activities.

Potential barriers like infrastructure needs and implementation costs are to be addressed for each energy issue area. These challenges can lead to opportunities to work with policy makers to advance transportation projects with the goal of making more efficient use of our transportation system and reducing pollutants that degrade the quality of life in the region. Input from technical committees and working groups will be shared with SANDAG policy committees to develop strategies for inclusion in the 2007 RTP.

Attachment: 1. 2007 Regional Transportation Plan (RTP): Energy White Paper

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INTRODUCTION

The update of the Regional Transportation Plan (RTP) should recognize energy affects of the transportation system, identify appropriate measures to reduce the rate of fuel consumption, and highlight plan components that yield energy-saving results. RTP aspects that inherently save energy and reduce emissions include smart growth, congestion management, and demand management through added travel choices like mass-transit and carpooling.

Subsequent to the adoption of MOBILITY 2030, California has undergone significant changes in law and mandate regarding climate change. In 2005, Governor Schwarzenegger established Executive Order S-3-05 calling for statewide greenhouse gas (GHG) emission reductions. In September 2006, the California Global Warming Solutions Act of 2006 was signed into law, which creates a statewide GHG emission limit that will reduce emissions by 25 percent by 2020. The law will first require mandatory GHG emission reporting and reductions from the electricity sector. It also requires all state agencies to consider and implement GHG emission reporting and reduction strategies.

Energy implications of the transportation sector are receiving greater scrutiny. Transportation is the largest source of climate change emissions in California. The California legislature has recognized that “passenger vehicles and light-duty trucks are responsible for 40 percent of the total GHG pollution in the state.” In March 2006, the California Attorney General filed comments on the Orange County Transportation Authority (OCTA) Draft Environmental Impact Report (EIR) for its long range transportation plan. The draft EIR was considered inadequate because it did not recognize or address GHG emissions. The Attorney General’s Office called for improvements in the OCTA final EIR to avoid legal challenges; OCTA complied and made these changes.

The 2007 RTP can meet state mandates and regional needs through the inclusion of measures like an alternative fuel vehicles program, enhanced linkages among smart growth, energy and sustainability, and a strategy for the region to address climate change. These aspects identified in the RTP can be further realized through an update of the Regional Energy Strategy (adopted by SANDAG in 2003).

Objectives for 2007 RTP

- Identify existing alternative fuel and alternative vehicle programs at state and national levels and propose suitable program(s) for the San Diego region.

- Include energy and GHG emissions impacts and reductions from various travel choices and from smart growth efforts.

- Enhance the energy component of the plan’s EIR to recognize and explain the importance of climate change.
  - Recognize and explain the projected impacts of GHG’s. Include reference to these emissions in both the air quality and energy sections of the EIR.
Identify an action plan and possible funding sources for SANDAG to inventory GHG emissions, develop a course of action, and implement measures to address climate change in the RTP.

**Background**

**Alternative Transportation Fuels and Vehicles**

The use of alternative fuels can reduce dependence on foreign oil, provide economic development opportunities, and reduce emissions of GHG’s, criteria pollutants, and toxic air contaminants. Moving toward a more diversified approach to fuels and supporting the advancement of higher efficiency vehicles is one of the state’s goals. The California Energy Commission (CEC) and California Air Resources Board (CARB) set a goal that 20 percent of all transportation energy used in 2020 comes from alternative fuels (current alternative fuel use in 2005 is six percent). If California successfully meets this goal, about 4.8 billion gallons of gasoline and diesel will be displaced annually by alternative fuels.

According to a 2005 CEC report, the state’s demand for transportation fuels has increased 53 percent in the last 20 years and in the next 20 years gasoline and diesel demand will increase another 36 percent. California refineries rely increasingly on imported petroleum products to meet this demand. This growing demand and the increasing challenge faced by refineries in meeting this demand will lead to more frequent price volatility and potential economic dislocation. In 2003, the CEC and CARB adopted a two-pronged strategy to reduce petroleum demand: promoting improved vehicle efficiency, and increasing the use of alternative fuels.

California law defines alternative fuel as “…a nonpetroleum fuel, including electricity, ethanol, biodiesel, hydrogen, methanol, or natural gas that, when used in vehicles, has demonstrated, to the satisfaction of the air resources board, to have the ability to meet applicable vehicular emission standards.” Alternative fuel also may include petroleum fuel blended with nonpetroleum constituents, such as E85 or B20.

In September 2005, Governor Schwarzenegger signed into law Assembly Bill (AB) 1007 requiring the CEC to prepare a state plan no later that June 30, 2007, to increase the use of alternative fuels in California. This plan is underway along with other alternative transportation efforts. San Diego Gas & Electric (SDG&E) has restarted an electric vehicle program, Miramar College has a hydrogen highway program, and the CEC has a truck-stop electrification program and a heavy-duty advanced technology development program.

**Climate Change**

The state has declared that global warming poses a serious threat to the economic well-being, public health, natural resources, and the environment of California. The potential adverse affects of global warming include the exacerbation of air quality problems, a reduction in the quality and supply of water to the state from the Sierra snow-pack, a rise in sea levels resulting in the displacement of thousands of coastal businesses and residences, damage to marine ecosystems, and the natural environment, and an increase in the incidences of infectious diseases, asthma, and other human health-related problems.
• On June 15, 2005, Governor Schwarzenegger established Executive Order S-3-05. Executive Order S-3-05 established the following GHG emission reduction targets for California: by 2010, reduce GHG emissions to 2000 levels; by 2020, reduce GHG emissions to 1990 levels; by 2050, reduce GHG emissions to 80 percent below 1990 levels.

• On March 30, 2006, the California Attorney General filed comments on the OCTA Draft EIR for its long range transportation plan. The comments collectively stated that the OCTA RTP and Draft Plan EIR were not acceptable because they did not adequately address climate change impacts.

• California Global Warming Solutions Act of 2006 (AB 32) was signed into law on September 27, 2006. This law calls for statewide GHG emissions limit equivalent to the statewide GHG emissions levels in 1990 to be achieved by 2020. It requires all state agencies to consider and implement GHG emission reduction strategies.

Current Conditions

The current RTP, MOBILITY 2030, does not address energy impacts directly: energy is addressed in the EIR. The 2030 RTP EIR acknowledges the potential benefit of alternative fuels program on the region. In general terms, the EIR makes the correlation between optimized public transportation and reduced energy consumption. These more generalized impacts could be addressed in greater detail for the 2007 RTP update.

MOBILITY 2030 states how the region can grow smarter, including an air quality assessment. There is no mention of climate change and the regional impacts of GHG’s resulting from the plan. The 2007 RTP could enhance the air quality sections to address GHG emissions, or provide reference to the energy section for GHG impacts. SANDAG air quality and energy staff could collaborate to identify additional ways to address climate change in the update.

Identification of Problems

Alternative Transportation Fuels and Alternative Vehicles

The identification and status of a variety of transportation efficiency, alternative fuel, and alternative vehicle programs is unclear. The state is to complete an alternative transportation fuels plan of action in June 2007. Many existing alternative vehicle programs at the CEC are unstaffed. Regarding the availability of alternative fuels in the region, there is only one alternative fueling station in San Diego (located on El Cajon Boulevard in the mid-city area of the City of San Diego) that sells ethanol, CNG, and LPG. It is difficult for drivers in the region to switch to alternative fuels when only one station can accommodate their needs in Southern California.

Although the use of alternative fuels can reduce dependence on foreign oil, provide economic development opportunities, and reduce emissions of GHG’s, criteria pollutants, and toxic air contaminants; these same fuels may result in an overall increase of certain criteria pollutants that raise public health concerns and constrain the state’s ability to meet its State Implementation Plan requirements. The AB 1007 process is to address potential air quality conflicts to ensure a harmonizing of transportation energy and air quality policies and objectives.
Climate Change

After the Attorney General’s Office filed comments with OCTA regarding its 2006 Long-Range Transportation Plan Draft Program Environmental Impact Report, OCTA took the following steps to avoid possible legal challenges to its RTP EIR on this issue.

OCTA expressed a commitment to develop a plan, through a public process, which consists of:

- Inventory of GHG emissions from RTP activities, both direct and indirect, and including nontransportation sources
- Broad GHG reduction goals targeted to the Governor’s Climate Action Team goals
- Specific actions to meet specific reduction goals
- Identification of public and private funding sources to implement actions
- A monitoring and public information plan

Anticipated problems for SANDAG in this regard will include determining the appropriate scope of a GHG plan, securing adequate resources to develop and implement such a plan, as well as developing an educational component to inform local stakeholders and securing their participation. Some stakeholders in the region view climate change as a problem to be addressed at the global and national level, and question whether it can be effectively addressed at the local and regional level.

DISCUSSION

Potential Solutions/Alternatives

Reducing Fuel Demand Through Integrated Land Use and Transportation Planning

The 2007 RTP could showcase aspects of the plan that inherently save energy and reduce emissions. These components include: smart growth, congestion management, and other systems management measures, and demand management through added travel choices like mass transit and carpooling. If finalized by the CEC in time for the RTP, the PLACE3S model can be used to further identify energy affects of various land use and transportation scenarios.

Alternative Transportation Fuels and Vehicles

SANDAG could research and identify existing alternative fuel and alternative vehicle programs in the region and nationally. The RTP could include possible programs to identify barriers and solutions for additional alternative fueling stations to be located in the region. SANDAG also could participate in the CEC development of an alternative transportation fuels plan to ensure it meets the needs of the region. SANDAG also can identify the rate that diesel buses in the regional transit fleet are being converted to CNG vehicles.

The 2007 RTP can provide an outline of these activities, with the intention that implementation measures be identified in the update of the Regional Energy Strategy (RES). The RES will include transportation, land use planning, and climate change in its update.
Climate Change

The RTP can identify current measures in existence or under development to address climate change. Organizations can include the California Climate Action Registry and ICLEI (Local Governments for Sustainability). A regional action plan can be further developed through the update of the Regional Energy Strategy.

SANDAG also could encourage member governments to develop local climate action plans. ICLEI has developed a local climate action plan template and tools that governments around the world have adopted. More than 159 U.S. local governments participate in the ICLEI Cities for Climate Protection Campaign (CPC). Locally, the Cities of Chula Vista and San Diego have developed city action plans. Future government protocols will be developed by the state to complement existing plans. A Local Climate Action Plan Includes:

1. A jurisdiction’s GHG emissions data (baseline emissions inventory, emissions forecast, and emissions reduction target).

2. GHG reduction measures (existing measures that will continue, new or proposed measures, quantified emissions reductions resulting from each measure).

3. Implementation strategies (costs, responsibilities, schedules, and funding sources for implementing each measure and procedures for monitoring the progress of all reduction measures).

The California Climate Action Registry, in cooperation with the California Energy Commission, ICLEI and California Climate Action Team, are to develop protocols for local governments to address climate change. This activity is underway at the state level.

Additionally, AB 32 states that on or before June 30, 2007, the state air resources board shall publish and make available to the public, a list of discrete early action GHG emission reduction measures that can be implemented prior to the measures and limits adopted pursuant to Section 38562.

RECOMMENDATIONS

The RTP should include acknowledgement of inherent energy-saving measures in the plan.

For the RTP Update

- Identify existing alternative fuel and alternative vehicle measures at state and national levels and propose suitable program(s) for the San Diego region.

- Include energy and GHG emissions impacts and reductions from various travel choices and from smart growth efforts.

- Enhance the energy component of the plan’s EIR to recognize and explain the importance of climate change.
Recognize and explain the projected effects of GHG’s. Include reference to these emissions in both the air quality and energy sections of the EIR.

Identify an action plan and possible funding sources for SANDAG to inventory GHG emissions, develop a course of action, and implement climate change mitigation measures in its transportation plan.

- Recommend that the RES be updated so as to integrate transportation, land use and climate change in the long term energy plan for the San Diego region.

For Future Analysis

SANDAG could engage the Climate Action Team in the development of local government GHG protocol to ensure that the needs of local governments are best served.

SANDAG should continue work with the CEC on the PLACE3S model so that land use, transportation, and energy modeling are integrated into a robust regional planning model.

BIBLIOGRAPHY


March 2006 California Climate Action Team Report to Governor Schwarzenegger and the California Legislature

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