AGENDA HIGHLIGHTS

- TransNet SMART GROWTH INCENTIVE PROGRAM FUNDING RECOMMENDATIONS
- TransNet ENVIRONMENTAL MITIGATION PROGRAM GRANT RECOMMENDATIONS
- SMART GROWTH DESIGN GUIDELINES
- NEW REGIONAL PLANNING STAKEHOLDERS WORKING GROUP
- SUSTAINABLE REGION PROGRAM ACTION PLAN AND TOOLKIT
- SUMMER ENERGY OUTLOOK REPORT FROM SDG&E

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MISSION STATEMENT

The Regional Planning Committee provides oversight for the preparation and implementation of the Regional Comprehensive Plan that is based on the local general plans and regional plans and addresses interregional issues with surrounding counties and Mexico. The components of the plan include: transportation, housing, environment (shoreline, air quality, water quality, habitat), economy, borders, regional infrastructure needs and financing, and land use and design.
Welcome to SANDAG. Members of the public may speak to the Regional Planning Committee on any item at the time the Committee is considering the item. Please complete a Speaker’s Slip, which is located in the rear of the room, and then present the slip to Committee staff. Also, members of the public are invited to address the Committee on any issue under the agenda item entitled Public Comments/Communications/Member Comments. Speakers are limited to three minutes. The Regional Planning Committee may take action on any item appearing on the agenda.

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REGIONAL PLANNING COMMITTEE
May 1, 2009

ITEM #

+1. APPROVAL OF THE APRIL 3, 2009, MEETING MINUTES

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

Members of the public will have the opportunity to address the Regional Planning Committee (RPC) on any issue within the jurisdiction of the Committee that is not on this agenda. Speakers are limited to three minutes each and shall reserve time by completing a "Request to Speak" form and giving it to the Clerk prior to speaking. Committee members also may provide information and announcements under this agenda item.

CONSENT ITEM (#3)

+3. REVISIONS TO SHORELINE PRESERVATION WORKING GROUP CHARTER
(Shelby Tucker)

The Shoreline Preservation Working Group is proposing revisions to its charter to make its selection of the Chair consistent with SANDAG policy and to add a tribal government representative as an advisory member. The RPC is asked to approve the proposed revisions.

REPORT ITEMS (#4 thru #10)

+4. TransNet SMART GROWTH INCENTIVE PROGRAM: PROJECTS RECOMMENDED FOR FUNDING (Stephan Vance)

The RPC is asked to recommend a list of smart growth projects for funding to the Transportation Committee and Board of Directors in the first cycle of the TransNet Smart Growth Incentive Program.

+5. TransNet ENVIRONMENTAL MITIGATION PROGRAM: FISCAL YEAR 2009 LAND MANAGEMENT GRANTS (Keith Greer)

The RPC is asked to recommend a list of land management projects for funding for the FY 09 TransNet Environmental Mitigation Program to the SANDAG Board of Directors.

+6. FINAL DRAFT SMART GROWTH DESIGN GUIDELINES (Stephan Vance)

The RPC is asked to recommend that the SANDAG Board of Directors accept the final draft smart growth design guidelines entitled Designing for Smart Growth, Creating Great Places in the San Diego Region for distribution.
+7. ESTABLISHING THE REGIONAL PLANNING STAKEHOLDERS WORKING GROUP
(Jane Clough-Riquelme)

The purpose of the Regional Planning Stakeholders Working Group (SWG) will be to review and provide input into key activities associated with the implementation of the Regional Comprehensive Plan (RCP), development of the Sustainable Communities Strategy (SCS), the 2050 Regional Transportation Plan (RTP), and other regional initiatives. The Regional Planning Committee is asked to recommend that the Board of Directors authorize the creation of the SWG as well as the SWG Charter and call for membership applications. The Regional Planning Committee also is asked to appoint two of its members to review applications.

+8. SUSTAINABLE REGION PROGRAM ACTION PLAN AND TOOLKIT
(Susan Freedman)

As part of the California Energy Commission (CEC) agreement, SANDAG was tasked with developing transferable tools and resources based on our energy planning efforts. The Sustainable Region Program (SRP) Action Plan and Toolkit provide guidance that other regional governments can use if they wish to implement an energy-saving program for local governments. These documents were developed in partnership with the CEC, California Center for Sustainable Energy, and San Diego Gas and Electric (SDG&E). They will be used in the region when SANDAG expands the SRP to all local governments through a Local Government Partnership with SDG&E. The RPC is asked to recommend that the Board of Directors accept the Action Plan and Toolkit for distribution and use.

9. SDG&E SUMMER ENERGY OUTLOOK AND LOCAL GOVERNMENT ACTIVITIES
(Hal Snyder Frank Spasaro, SDG&E; Susan Freedman, SANDAG staff)

Hal Snyder Frank Spasaro, SDG&E, will provide the RPC with the Summer Energy Outlook for the region. He also will discuss SDG&E’s new partnership with Nissan to bring zero emission vehicles to the San Diego region and how SANDAG can partner on the project. In addition, Mr. Snyder Spasaro will provide an overview of a new local government partnership with SANDAG that will build on the CEC partnership and expand the Sustainable Region Program to all local governments through 2011.

10. UPCOMING MEETINGS

The next meeting of the Regional Planning Committee is scheduled for June 5, 2009, at 12 noon.

11. ADJOURNMENT

+ next to an agenda item indicates an attachment
The meeting of the Regional Planning Committee was called to order by Chair Jim Janney (South County) at 12:01 p.m. See the attached attendance sheet for Regional Planning Committee member attendance.

1. APPROVAL OF MEETING MINUTES

   Action: Upon a motion by Vice Chair Jerry Jones (East County) and a second by Councilmember Steve Gronke (North County Inland), the Regional Planning Committee unanimously approved the minutes from March 6, 2009, meeting.

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

   Action: There were no public comments/communications/member comments.

CONSENT ITEM

3. UPDATED SMART GROWTH CONCEPT MAP (INFORMATION)

   This item was presented for information only.

REPORT ITEMS (#4 THROUGH #7)

4. COASTAL REGIONAL SEDIMENT MANAGEMENT PLAN (RECOMMEND)

   Shelby Tucker, Associate Planner (SANDAG), reported that SANDAG was awarded funding from the California Department of Boating and Waterways to prepare a Coastal Regional Sediment Management Plan for San Diego. The CSMW, which includes entities such as the Department of Boating and Waterways, Army Corps of Engineers, and others, is developing a master plan for the state to guide efforts in addressing the political, regulatory, and environmental and process-related issues anticipated to arise when implementing sediment management. The Coastal Regional Sediment Management Plan is a comprehensive document that provides guidance in addressing how sediment management can be used for targeting coastal erosion in an expeditious, cost-effective, and resource-protective manner.
It builds on the region’s Shoreline Preservation Strategy, which proposes an extensive beach building and maintenance program for critical shoreline erosion areas that include sand nourishment, sediment management devices, and policies and regulations regarding the use of the shoreline and its development. The Plan moves the region forward to a coordinated approach designed to meet a long-term vision and lays out the projected needs for the region regarding sediment. The region needs 30 million cubic yards to become completely restored and needs to maintain it at the rate of about 400,000 cubic yards per year. Adding 1 million cubic yards per year would offset the 400,000 cubic-yards-per-year dispersion, or loss rate, and supply the 30 million cubic yards needed over approximately 50 years.

For implementation, the region needs to build upon the momentum already started related to large- and small-scale replenishments. Coordination must be maintained with regulatory agencies to assure plan recommendations can be carried out and opportunities must be sought. SANDAG is working on efforts related to the Quality of Life Funding Strategy that has the potential to provide a regional funding source for beach nourishment as well as other activities. Specific implementation options include local coastal plans adopted by the jurisdictions, which require project proponents consult with the Plan to ensure sand replenishment opportunities are not lost as projects are built; and, establishment of a general permit program that would streamline environmental review and permit approval by all agencies. Plan recommendations include continuation of opportunistic programs and maintenance dredging operations, along with consideration of proportional placement and implementation of larger projects such as those in Imperial Beach, Solana Beach, Encinitas, and the Oceanside harbor. It also recommends consideration of sediment management devices such as artificial submerged reefs, which could reduce the volume needed for replenishment.

County Vice Chairwoman Pam Slater-Price (County of San Diego) informed that she is Chair of the Shoreline Preservation Committee. The Committee is committed to this program as it is the best way to prevent further erosion and keep beach sand at the maximum level. The program has buy-in from the different jurisdictions because it is a very well thought out program and part of a statewide effort. She moved that the Committee adopt the staff recommendation.

Chair Janney thanked her for her time and efforts.

Councilmember Heebner asked if the opportunistic beach fill has to stay within the city.

Ms. Tucker replied it looks at what the maximum quantities available are for each jurisdiction, and if they put that maximum amount on the beach each year, and it is quite a lot, but we still recommend in the plan that large-scale replenishment get used because it is more financially feasible. Opportunistic is whenever these opportunities arise to the likelihood of it all happening in one year.

Councilmember Heebner asked how many cities have this program.

County Vice Chairwoman Pam Slater-Price commented Encinitas has it.
Ms. Tucker replied all the cities have the program except the City of San Diego and the City of Del Mar.

Councilmember Heebner said she would second the motion.

Councilmember Gronke asked if they are at the point of getting 1 million cubic yards, or approaching that point.

Ms. Tucker replied the Plan lays out what would be needed and there are mechanisms to reach that need. To reach the 1 million cubic yards need, opportunistic programs and large-scale programs can be done along with lagoon dredging. It is a collection of activities that can occur in any one year that will produce a specific amount of sand and it averages out to be approximately 1 million cubic yards per year.

Councilmember Gronke asked if restoration of some of the natural lagoons was included in the Plan.

County Vice Chairwoman Slater-Price commented they are undergoing it now.

Ms. Tucker added the Plan acknowledges that lagoon restoration is an ongoing activity that is occurring, and that when restoration occurs there are often excavation activities where sediment is taken out of it and placed either north or south. So excavation activities give another source of material that would naturally make it to the coastline.

Councilmember Gronke asked if it was possible to bypass under water by building some type of structure under water.

Ms. Tucker said bypassing for Oceanside Harbor at this point is to dredge it, use a barge, and take it south. In working with Camp Pendleton, it was found that there is a lot of sediment located north of the harbor that they are willing to have taken back to where it should have naturally gone had the harbor jetty not been there.

Councilmember Gronke asked if it would be a dredging operation similar to what is going on.

Ms. Tucker stated it would be a dredging operation similar to what was done in 2001.

Bill Anderson (Regional Planning Technical Working Group) asked if the forecast took into account potential rising sea levels due to climate change, as it looks as if the analysis was done prior to some of those forecasts.

Ms. Tucker reported that the forecasting of the needed numbers was done, as part of the Shoreline Preservation Strategy in the late 1990s. One of the recommendations in the Plan is to update the Shoreline Preservation Strategy with new information such as counteracting sea level rise, new numbers related to sea level rise, and other things related to new technology since the 1990s.
Rocky Chavez (North County Transit District) requested examples of the potential government action to amend local coastal plans, city/county grading permits, and regional general permits.

Ms. Tucker explained that local jurisdictions who desire to take this on as an issue can have ownership of deciding if a project is consistent with the Plan and whether there is a potential of the project having sediment; or, if it is something that wouldn’t apply with no chance for sediment. An example is what occurred in the City of Encinitas. They had a mixed-use project along the coastline with an excavation of material that was beach sand-compatible so they were able to place it. There are options for cities to incorporate this document and the concept of sediment management into their own planning programs, such as permits and coastal plans.

Mr. Chavez stated North County Transit District (NCTD) built the SPRINTER, which was originally aligned along an old riverbed. There was an issue of runoff into the riverbed and it ended up being a significant exposure and expense to NCTD having sediment impact the riverbed. He asked how this Plan would address issues such as this.

Ms. Tucker said this Plan would aid with coordination by working with the regional board and other entities like NCTD, when there is sediment available, to take it to the beach if it is compatible. If it is not, then the Plan does not have a role in it.

Executive Director Gary Gallegos (SANDAG) added that another example would be if in the excavation for a retaining wall, material was found compatible with sand on the beach. Then, instead of putting it in a landfill, opportunities could be found to match up the materials in order to take it to a beach that needs sand. The challenges on the SPRINTER were related to runoff during the construction piece of the project, so it is not known if the Plan could have solved the problem. The Plan will not help the overall water quality piece of a regular construction project. There may be some opportunities but they are two separate issues. This plan helps find opportunities to where there’s compatibility and to look for those win/wins.

Mr. Chavez commented there is discussion about dual tracking for the SPRINTER. He said he would like to see what the impact would be and what the value would be if sand was found to mine; if there would be some economic benefit to NCTD.

Mr. Gallegos said a good example on a transit project was the grade separation in Solana Beach. A lot of the excavation met the quality standards for the beach and some of it was placed on the beaches.

County Vice Chairwoman Slater-Price informed 50,000 cubic yards were placed on the beaches. Encinitas was an ideal situation because it was two blocks from the beach, so the sand material was very good quality and completely compatible. There are also donor sites off in North County as well as receiver sites, so if you are doing a project it becomes a benefit as you can put sand on the beach.

Councilmember Jerry Kern (North County Coastal) asked if the Encinitas project was a one-time deal in getting permission from the Coastal Commission for the one project.
Ms. Tucker said Encinitas has an opportunistic program but has not received permits yet, so that specific project was separately permitted. The opportunistic programs, however, will have a general permit, which will allow maximum material placement when available, so a permit will not be necessary every single time as long as the parameters of the permit are met within a five-year timeframe.

Councilmember Kern asked if it would be better to incorporate it into a plan so it can be approved at a local level unless there is some appeal to the Coastal Commission.

Ms. Tucker said a permit would still have to be obtained even if it was in your coastal plan, but it makes it more effective to do a general permit.

Action: Upon a motion by County Vice Chairwoman Pam Slater-Price and a second by Councilmember Heebner, the Regional Planning Committee unanimously recommended that the Board of Directors adopt the Coastal Regional Sediment Management Plan.

5. LONG-RANGE REGIONAL PLANS AND FORECASTS: A WORK PLAN TO COMPLY WITH SENATE BILL (SB) 375 (INFORMATION)

Coleen Clementson, Committee Coordinator, informed that over the next 2½ years work will be done on a number of long-range planning efforts that will lead to the adoption of a new Regional Transportation Plan (RTP) in July 2011. The San Diego region is the first major metropolitan planning area that will be subject to the provisions of SB 375. She summarized the new provisions and provided a brief review of the eight projects leading to the next RTP and setting the stage for the future update to the Regional Comprehensive Plan (RCP).

Regarding SB 375, the California Air Resources Board (CARB) will be setting a greenhouse gas emissions reduction target for the San Diego region and the challenge will be to figure out how to reach that target through the development of the Sustainable Communities Strategy (SCS). If SANDAG is unable to meet the greenhouse gas reductions, an Alternative Planning Strategy will be prepared describing the additional land use changes, additional transportation investments, or other measures that must be incorporated to meet the greenhouse gas target. Work will also be done on the Regional Housing Needs Assessment (RHNA) process to align the process with the adoption of the RTP and ensure the allocation is consistent with the SCS. An enhanced public involvement program and expanded environmental analysis is also required in order to take advantage of the CEQA streamlining benefits available through SB 375.

With respect to the 2008 Settlement Agreement on the 2030 RTP EIR, the Impediments to Transit Study is almost completed and the results will be presented to the Board later this month. An Urban Core Transit Strategy is being developed to incorporate transit alternatives into the next RTP. There are other provisions related to the Smart Growth Concept Map and the Smart Growth Incentive Program not included in this report.

The first major task is the preparation of the 2050 Regional Growth Forecast. A draft Existing Plans Forecast is expected early this summer, and the second phase of the forecast will be developed to look at different scenarios on how to accomplish growth in later years.
The goal is to have a final forecast in early 2010, which will be used in modeling some of the transportation alternatives in the regional transportation planning process. The Urban Core Transit Strategy contributes toward the goals necessary to achieve in the SCS and significantly increases the transit mode share in the urban core area. Stakeholders have been invited to comment on the draft scope of work and the Request for Proposals should be released at the end of May.

The Airport Multimodal Accessibility Plan will be something new that will be incorporated into the RTP. It will address improved surface transportation access to region airports, meeting greenhouse gas targets, and how to address the reduction requirements through land use planning and transportation investments while also recognizing sensitive resource and habitat areas. There is cautious optimism regarding the SCS due to the previous work in the development of the RCP and Smart Growth Concept Map. Regarding the 2050 RTP, the 2050 horizon year will allow us to take advantage of the high-speed rail project and TransNet funding, which goes out to 2048. There is new federal legislation that needs to be complied with and we are proposing to do an economic analysis of the plan to derive economic costs and benefits to the region as a result of the plan. Regarding the RTP EIR, greenhouse gas baseline measurements and projections, mitigation measures to reduce the emissions, and a greater analysis of the environmental justice issues which include impacts to the lower-income and minority communities are required. A Public Participation Plan for public outreach to groups usually not represented in the planning processes is being prepared and a Regional Stakeholders Working Group is being developed. Next steps include putting together a draft charter and a proposed selection process for this group.

Mr. Chavez stated he thought it was great and expressed support. He asked if studies had been performed on community cultural aspects since higher-density housing and mixed-use communities along the corridors will be developed.

Ms. Clementson responded there is a forecasting group that examines a number of demographic issues and a workshop is planned to receive input regarding the assumptions being made in the growth forecast. Also, a social equity and environmental impact analysis will be performed to gain insight on impacts it will have on different communities.

Mr. Chavez expressed concern that open space is critical to allow people to walk and park, and not just live in an inner city. Having had the opportunity to live in Chicago, New York, and Washington, DC, and to see how transit communities develop, he said cities need to be conscious of putting in other elements to avoid having whole generations of children that have no idea of open grass areas because all they see are streets and right angles.

Ms. Clementson reported that in preparing the Smart Growth Concept Map, the suggestions for the areas for increases in density came from local jurisdictions. One of the tools for recreation and public spaces will be the Smart Growth Design Guidelines as the types of recreational facilities provided in an urban setting are different than the traditional suburban setting.

Mr. Gallegos stated an additional important tool is the visualization aspect and being able to understand and see the proposed development.
Mr. Chavez commented one of the good things about Washington, DC, is that it added bike trails and developed a very mobile active community along the density areas.

Mr. Gallegos added the other piece that will help this work is the Comprehensive Regional Bicycle and Pedestrian Plan.

Councilmember Kern expressed concern about the timing and asked what would be done if the targets cannot be accomplished.

Mr. Gallegos said that’s a very legitimate major question that we’ve been working on. Right now, we’re taking a two-fold approach. One of the approaches is to work with CARB to see if it can give us an advanced preliminary target. If unsuccessful, the other alternative we are exploring is clean-up legislation through law that would force them to give us some numbers or relief. The challenge is that SB 375 is to comply with state law and it puts requirements on the RTP. The RTP timelines are to comply with federal law; we are sandwiched between the state and federal government requirements. We are hoping we will be able to get an advance target from CARB, which will be close; however, if we are wrong, then we are challenged because these are complicated model runs and we need time.

Councilmember Kern stated he would hate to get out in front of this and waste a lot of time, effort, and money on staff’s part only to find in the end that we have to start over.

Al Ovrum (Metropolitan Transit System) remarked that if we don’t know what the standards are going to be, it seems the big emphasis is going to be on on-road vehicle use and the impact on what we have to do there.

Mr. Gallegos said SB 375 in itself is an implementing tool for AB 32, but it doesn’t deal with everything. It focuses on vehicles and light-duty trucks, so the structure is still very silo-like. SB 375 is forcing us to focus just on the automobiles and light trucks, and you’re correct that there’s another piece that will help contribute to the overall AB 32 goals, which we will not know for a while, but at least we’ll be given a target for the transportation side of that equation.

Councilmember Heebner commented that Item No. 7 says the models initially showed that the Smart Growth Map and current RTP would reduce carbon by 2.5 million metric tons and asked if there was an idea of what CARB is looking at for the region.

Rob Rundle, Principal Planner (SANDAG), informed the 2.5 million metric tons incorporated transportation demand management as well as full implementation of the Smart Growth Concept Map with additional transit, the unconstrained component of the 2030 RTP. Model results are currently being refined and the number has changed a little but, at the time that number was presented, that represented half of what the state was looking at. The 5 million metric tons is what the state is looking at for cars and light trucks; however, we have been told that the 5 million metric tons state number is a placeholder and is likely to change through the target-setting process.
Mr. Gallegos added he thought the 5 million metric tons is probably a goal achievable in a lot of different ways. He expressed concern that if they make that target a lot higher, then it makes it more difficult to achieve the target.

Councilmember Heebner pointed out that CEQA streamlining provisions are not mandatory; and, if there is a transit priority project in the SCS, and if the other criterions are met, then the CEQA exemption is mandatory. What that means is that roads in the RTP that are being analyzed will not have to be analyzed regarding that specific project for GHG, emissions, or traffic impact from that project. She said this RTP is going to be a monster and staff is aware that they have to put in some very realistic assumptions in the RTP because jurisdictions don’t have a standard for the commercial portion of mixed-use projects in transit priority projects. We want to make sure that the traffic generated that’s going to be studied in the region’s RTP is probably looking at a worst-case scenario if this RTP doesn’t get challenged. She relayed an instance from her city in which the finding states “there are no adverse impacts to the surrounding area.” A finding of “yes” without an adequate study in an EIR would result in a lawsuit by one group; and a finding of “no” without an adequate study in the RTP EIR would result in a lawsuit from another group. She was glad a stakeholders working group was being formed and pleased to see the outreach that will be using existing community networks. She said it is not impossible to meet these criterions to become CEQA-exempt.

Mr. Anderson remarked the other plan and forecast probably should be on the calendar as the Urban Water Management Plan. He said he had raised this issue before as they are struggling when they are between urban water management plans and trying to increase density to meet some of the RHNA, and Smart Growth, and Transit-Oriented Development requirements for community plan updates. They bump up against the water supply assessments that have to make the finding that they cannot guarantee there is water and it puts elected officials in an awkward position. Do they support workforce housing near transit without a finding there is water available; or do they say since there is no water, the Smart Growth development cannot be approved. The public is confused by this too, so it is something that is very important and needs to be coordinated.

**Action:** This item was presented for information only.

6. **REGIONAL ENERGY STRATEGY (RES) UPDATE: GUIDING PRINCIPLES AND GOALS (DISCUSSION)**

Councilmember Carrie Downey (City of Coronado), Chair of the Energy Working Group, reported the current Regional Energy Strategy (RES) adopted by the SANDAG Board in 2003 was funded by the California Energy Commission (CEC). The RES looks at all the ways energy affects the region, and the Energy Working Group is currently working to update the goals and principles due to all of the changes that have happened since 2003.

Susan Freedman, Senior Planner (SANDAG), informed that SANDAG has a long history in energy planning and the SANDAG Board established the Regional Energy Working Group in 2004 to look at ways to implement the existing energy plan. A driver for energy program efforts is the partnership with the CEC, who has assisted with updating the RES, the development of the Regional Climate Action Plan, and enabled expansion of the
Sustainable Region Program for local governments. SANDAG is currently performing a regional alternative fuels assessment and developing some transferable tools and guidance that can be used by other MPOs or councils of government across the state should they be interested in entering into energy planning in their region.

The purpose of the RES update is to identify energy imperatives for the region in transportation, electricity, natural gas, and land use planning. The focus will be on measures that regional and local governments can either influence or implement on their own. The plan process includes developing the regional guiding principles as well as updating regional energy goals. Targets will be selected for each of those goals, policies, and actions that can be implemented in the region. In order to develop the results a lot of new energy analysis has been undertaken and input on new studies has been received from the Air Resources Board and the Energy Commission. Performance measures will also be included in the update to track progress on the update. There will be an expansion from the 2003 plan based on areas that the state is emphasizing on regional energy planning. Areas of emphasis include energy considerations of land use and transportation planning and petroleum reduction in the state. The draft guiding principles will serve as a framework for regional decision-making on energy. The draft regional energy goals will represent broad long-term goals for the region. Next steps include continuation of plan development at Energy Working Group meetings, returning with the first draft in June. A public workshop and public comment period will be held in the summer, and at the same time comments from peers at state agencies, including the CEC and CARB as well as the local government commission, will be sought. The final draft will be presented to the RPC for consideration and then presented to the Board in October.

Councilmember Downey added these are very high-level goals that were previously not technically possible. They are trying to make the goals achievable and realistic so they can be used in other plans that follow from the RES.

Councilmember Gronke asked if SDG&E has approached SANDAG or the County regarding a proposal to build a new nuclear facility in San Diego County.

Councilmember Downey said it has come up in discussions with Energy Working Group as a possibility; however, SDG&E sits on the Energy Working Group and has not brought it up. She asked Councilmember Gronke if it was something he would like them to look at as a possibility in the RES.

Councilmember Gronke stated he was not a great lover of nuclear energy because they have yet to find a way to get rid of the waste and, until they come up with that solution, there is no reason to go down that path, but it’s certainly something that this Administration seems receptive to.

County Vice Chairwoman Slater-Price commented this is an area of interest for her because it is clean energy in terms of generation and has been used other parts of the world for a long time without any significant problems, including Switzerland and France. She also heard about the Obama Administration wanting to put this forward; however, they are not moving forward on finding a place to store the spent rods and other items even though there is some recycling of the materials, which other countries are doing. She said personally
she thinks this is something that should be looked at as it is the technology that does deserve to receive some scrutiny if we really want to find a way to generate electricity and keep the air pollution down. She thinks more should be done in terms of rooftop solar and getting people involved in rooftop solar through building standards and building homes so that they don’t require a lot of extra generation. She said there are two things when talking about this issue: (1) That there will always be additional generation needed during times when wind or solar-generated power cannot be relied upon; and, (2) That unless there is some kind of mandate, everyone won’t be participating.

Councilmember Downey reported it has been part of the discussion at the working group; however, it is called “exceeding Title 24 building standards.” One of the things that comes along with that is new construction and what has been seen is a lot of energy savings if cities are willing to talk about zoning and code standards for upgrades to existing housing. Regarding nuclear, part of the problem is that there is still a moratorium in the state, so that is one of the reasons why SDG&E has not brought up the subject. She asked if she was suggesting, separate from this effort, that SANDAG join some of the organizations that are actually working to get rid of the moratorium.

County Vice Chairwoman Slater-Price said she did not think it was necessary to advocate as there is so much more to explore and learn about technologies which have been successful in other parts of the world, where they have been used for a long period of time without any significant mishaps or even any mishaps. She commented Germany has about 50 percent of the sunlight that California has, yet they’re one of the leaders in solar power and are also working on wind generation. Europe is ahead on solar and wind energy, and there are lessons that could be applied here. In terms of looking where we have the greatest need, it is individual cars.

Councilmember Downey said it is being looked at, and it is hoped that this RES will give everyone the flexibility to meet all the requirements that are coming.

Councilmember Heebner asked is there was a reason why renewable energy systems wasn’t included in the building strategies of the draft guiding principles.

Ms. Freedman reported by definition it was included and incorporated under the goal as part of distributed generation, which would include rooftop solar, small-scale wind, and fuel cells.

Councilmember Heebner said on page six, under goal “Energy Considerations for Land Use and Transportation Planning,” the first paragraph discusses “to increase the number of designated potential Smart Growth areas...” I would suggest that we do that, but in the transit priority areas because that is where we want to see the more frequency we know our transit companies are going to be focusing on keeping their routes and funding them.

Councilmember Gronke suggested considering the plug-in type of electrical units for cars as there are no places to recharge them if we are going to have transportation hub cores. It might be a place that we want to have a financial incentive to place those types of recharging units. It will be necessary to allow for some type of recharging areas in logical locations so that someone can go through the county and plug and play and move along.
Councilmember Downey commented that comes down to the individual community zoning to make that a possibility to improve, encourage, and provide the planning incentives to get them in each of the communities.

Ms. Freedman informed that Nissan and SDG&E have targeted San Diego, among four other cities around the country, to roll out as an early market their new five-seating sedan, which is an electric vehicle that will run 100 miles on a charge. SDG&E and Nissan have asked SANDAG for some help with possible stimulus dollars to help set up infrastructure.

Councilmember Gronke said it sounds like an opportunity, if SANDAG is the conduit for a lot of the stimulus money. If we are going to meet the needs of SB 375, then maybe we need to be that forward-thinking. He said he also thought the solar panel should be a component of a financial incentive whereby if we are going to give money to a mixed-use project or a transit-oriented project, then solar panels should be a part of that project; and if they are not, they don’t get our money.

Councilmember Kern remarked he thinks the biggest issue is going to be how electricity would be moved around the region.

County Vice Chairwoman Slater-Price commented that her issue with the Sunrise is they’re importing solar when solar is already here. She thought local solar should be used and buildings can be sustainable with their individual plan if it is done right.

Councilmember Kern said even if this building is self-sustainable and a person has his car plugged in downstairs, then it’s not actually self-sustainable because the car is draining the system. He said he thinks there are a lot of little things to worry about. It’s a laudable goal to have every building self-sustainable but we’re looking at a different way of transportation to get away from the hydrocarbon and go to electricity-based. Current buildings are unable to support enough solar panels to power a car for 100 miles.

Councilmember Downey stated it is actually going to be dealt with. The state and the Obama presidency are promoting the “Smart Grade Concept,” which deals with issues regarding how to infuse energy into one place, how energy gets around, and how it makes it more efficient. The RES does not attempt to do the state’s job of setting transmission corridors or the federal government’s job of establishing nuclear power. It talks about what this region’s goals are for the region, things we might actually have some control over.

Councilmember Kern asked how the power within the region will be distributed. There are some areas in eastern Oceanside where solar panels could be placed to be cost-effective, but how should they get them down to Carlsbad or Solana Beach or Encinitas, because that’s where more people have the cars. He said he thought it was not just the long-range big picture, but small range also.

Councilmember Downey said it would not be necessary.

Chair Janney commented they were going back and forth on energy philosophies.
Mr. Gallegos reported one of the possible alternatives that has been explored is the idea of infrastructure corridors. Right now, everything is still in silos, so energy companies are working on their transmission lines; highway companies are working on where the highways go; transit companies are working on the transit line; and water companies are working on their systems. Infrastructure corridors are a completely opposite model in which the right-of-way is shared along with expenses. This idea is beginning to be discussed at the higher levels at Caltrans, and has had a positive response.

Mr. Ovrum asked, regarding solar, if SDG&E’s policy to let the meter run backwards, yet never allowing it to go below zero, was unique to SDG&E.

Councilmember Downey responded it is not unique to SDG&E and is part of the discussion called the “Feed-In Tariff.” It has to do with making excess energy and where it goes, whether the owner should get paid for it or get a credit. There is legislation in Sacramento this year to address it as it is the same issue across all the regulated utilities. Once there is actual legislation, the Energy Working Group will review it and come back to recommend that SANDAG send a letter in support; however, that is not part of this right now.

Chair Janney questioned why build solar if you can’t sell it. He saw it as a priority to make it cost-effective. He liked the infrastructure sharing and thought SANDAG should be a leader.

County Vice Chairwoman Slater-Price favored putting the power lines underground, which is safer for the power lines, too.

**Action:** This item was presented for discussion only.

7. **REGIONAL CLIMATE ACTION PLAN (RCAP): GUIDING PRINCIPLES AND POLICY MEASURES (DISCUSSION)**

Councilmember Downey reported one of the other things that fell into the Regional Energy Working Group’s purview is the update of the Regional Climate Action Plan (RCAP). The Working Group is developing guiding principles and draft policies. This is new, and we are the first regional plan that’s going to be reviewed. The Working Group is trying to figure out how to address this at a regional level and feedback is necessary on some of the principles that have been developed and other ones the Committee wants considered. A final draft will be presented in the summer.

Andrew Martin, Associate Planner (SANDAG), stated the factors driving the development of the Plan include the AB 32 Climate Change Scoping Plan, and SB 375. Furthermore, state law requires metropolitan planning organizations, including SANDAG, integrate the transportation network with development patterns in a way that achieves greenhouse gas reduction targets for passenger cars and light-duty trucks in the next update of the RTP. Targets for 2020 and 2035 are yet to be established and will be done through the implementation of SB 375 that’s going on right now. Additionally, the Plan is being prepared as part of the partnership agreement with the CEC, and is also required as part of mitigation requirement adopted in the environmental impact report for the 2007 RTP.
The primary purpose of the Plan is to assist in the development of the SCS for the next RTP to help achieve greenhouse gas reduction targets required by SB 375. The Plan will focus on reducing emissions from on-road transportation, electricity generation, and natural gas end uses. The Plan will look out to 2030 to analyze recommended policies that SANDAG and its member agencies can support to address climate change, with an emphasis on measures that regional and local government can influence. Major components of the draft Plan include the development of overarching guiding principles; a summary of the region’s greenhouse gas emissions profile from the GHG emissions inventory for San Diego County, which was prepared by the Energy Policy Initiative Center at the University of San Diego, which SANDAG helped prepare and supports. It will include climate change impacts and adaptation measures specific to the region from the Regional Focus 2050 Study prepared by the San Diego Foundation, along with goals and policies developed to reduce emissions and identification of performance measures in order to gauge the effectiveness of these policies over time and monitor progress. Draft guiding principles are being developed to guide decision-making in a manner that ensures the region will achieve the required greenhouse gas reductions and regional impacts of climate change. The guiding principles will form the goals and policies for the Plan and have been developed with input from the Energy Working Group and the Regional Planning Technical Working Group. They emphasize the need to improve community design and mobility, provide funding for public transit, and support the transition to alternative transportation fuels among others. They communicate a responsibility for SANDAG and its member agencies to address climate change and their commitment to do so.

Staff conducted a literature review and will investigate methods of quantifying the potential to reduce emissions in order to inform decision-making so when future policies are presented, there is a way to gauge the policies. Reduction policies are characterized as quantitative and qualitative to assist in modeling in order to explore alternative methods to reduce emissions. SANDAG is a member of the Regional Targets Advisory Committee (RTAC) and will help CARB pick the methodology to set the targets. The modeling analysis in the Climate Plan will help inform SANDAG’s recommendations to the Committee and support the efforts to develop the SCS in the next RTP. The RCP includes annual performance monitoring of key quality of life indicators for the region; however, new measures expressly related to the GHG emissions and climate change are proposed in order to evaluate the success of these reduction policies over time. The current draft is focused on urban form and transportation measures. Next steps include returning to the Energy Working Group to continue development of the Plan and continued work on modeling and calculating the various greenhouse gas reduction policies. A draft Plan will be presented to the Regional Planning Technical Working Group and this Committee this summer. A public workshop will also be held to receive comments from state and local staff and peers. The final draft Plan will be presented to the Committee this fall, and presented to the Board in November 2009.

Councilmember Downey said some of these aren’t going to be easy, especially if there is an increase in parking fees, or a congestion fee, or a vehicle travel fee. It is necessary to find ways to get people out of their cars and one of the things that can be done is curb behavior to make it uneconomical. Some of these things are options, so it is not suggested that every jurisdiction is going to be asked to adopt them.
Councilmember Gronke said the Governor has already taken an approach of trying to increase vehicle mileage for light trucks and cars, and asked if SANDAG has taken an approach of trying to increase vehicle mileage for light trucks and cars. He asked if the agency, along with other agencies, could send letters supporting the Governor’s position, which would give him something to battle with when he meets with the federal government.

Councilmember Downey stated increasing mileage was actually modeled and it is known as the “Padley Standards” and the “Padley II Standards.” The SANDAG models and EPIC models that were run showed it still would not get the reductions needed.

Mr. Anderson suggested considering trip reduction along with vehicle miles traveled. It is important to emphasize reduction of short trips by eliminating trips with a better transit service, more housing closer to jobs, bicycling, and other forms of transportation.

Councilmember Downey said she would take it back to look at it. She noted actual avoidance of trips will have to be stressed also, and it is a very important distinction that perhaps has not yet been made.

Mr. Anderson stated we are trying to build more housing around transit, but most people who take the trolley drive to their trolley stop.

Councilmember Downey said this is a very good point.

Mr. Anderson said it’s the decision of cost benefit. Do we spend the resources to get that one person to avoid driving 20 miles or do we spend the resources to get five people to avoid driving three miles each.

Mr. Gallegos commented this is why SANDAG is advocating through the CARB process. Tools and flexibility are necessary because the solutions are not going to be “one size fits all” throughout California, and even within San Diego, as there may be certain parts of the region where certain tools will work better than other parts. We need to continue to do environmental impacts and the Board has also bought into doing an economic impact study in order to understand those trade-offs in terms of what it means to the different economies.

Councilmember Kern said the bottom line is behavior modification and asked if sociologists and others had been consulted to find how to get people to change the way they do things.

Scott Peters (San Diego Unified Port District) said there is a lot of evidence from this past year on what changes behavior, and it’s price. Of course we need to do, and should do, whatever we can locally, but when we decide how to respond to things like whether to pay for plug-ins for cars, we ought to consider in our assumptions what the price will be for fossil fuels. The final thing is that this can’t be done locally because it would be irrational and would put us at a real competitive disadvantage with the rest of the country. It would be beneficial to think about whether we want to engage the state or the nation in helping to provide the incentives that would assist in moving away from carbon fuel.
County Vice Chairwoman Slater-Price spoke on behalf of the County Department of Planning and Land Use saying they have reviewed the information and appreciate the work to date. She said they are concerned that without having it clearly defined in the title, the Plan primarily deals with transportation, and they think it would be better to have the complete package. Two recommendations for good examples are San Diego EPIC and San Diego Foundation, as they use those recommendations to say this should be flushed down and they think water is a big issue that no one wants to address because even though we go through drought periods, there is always an availability letter that can be obtained for a development. People are sick of being told to save water when they see new developments and they want to know why it is that we continue to approve new development. She reiterated the message from DPLU that it would be even more effective if it were clearer in its aim and broader in scope. She also said she noticed that water was not in any of the programs covered.

Mr. Gallegos informed that staff will be meeting with EPIC and the Foundation to collaborate so that work is not being duplicated. Locally, the EPIC inventory has been used statewide as a tool, and he said he thinks there are advantages when a third independent party is involved that has done the inventory. SANDAG will share with them what is needed to comply with all the plans and look for opportunities for collaboration.

Councilmember Downey reported both are on the Committee, with Scott from EPIC as the Vice Chair, so the Committee receives their input and appreciates it at every meeting.

Councilmember Gronke suggested asking developers of hybrid cars to build a facility within the jurisdiction as a trade-off because we are going to give them business and would ask for their business in return. He said he thinks it might be true for a lot of the green technologies, particularly solar, and suggested experimenting with solar panels on some of the mixed-use projects to encourage them to build their businesses within the community.

Mr. Chavez said he used to live in the Dakotas, where plug-ins are very common. The reason they do it is because they want people to use the stores. He does not think that the government is always the answer for things. Regarding the measurements in miles, we have seen in other countries that five-year plans don’t always work; you can’t structure it out. The challenge regarding public transportation is what it is that public transportation did right. To influence the public, the North County Economic Development Group said charging more money doesn’t work. The greatest way to influence people to be efficient with water is with education and peer pressure. A five-year plan is not going to work because we are a market society. Education will show the reason why you want to do it. And then you need to give them options like the toolbox so that people actually can be efficient and do it the right way.

Mr. Martin stated the idea is for it to be a long-term plan to 2030, not a five-year plan, and to have an increment at 2030 that is tied to the SB 375 target. Regarding behavior change and modification, a lot of factors drive behavior change. The whole idea of the study and modeling is to put some research behind the different influences on behavior.

Chair Janney thanked Councilmember Downey for chairing the Working Group and tackling the two major issues. Personally, he noted that everything presented was extremely
expensive except for ridesharing. Everything else is going to cost money to provide, and the costs are huge. He said he did not think the general public had any idea of what was in front of them and he could not see how it could be achieved in the current economy as it is enormous. Regarding the 55 mph speed limits, he said that personally, time is more valuable than anything else.

Chair Janney recognized new members attending the meeting, Deputy Mayor Don Higginson of Poway, Elsa Saxod of the San Diego County Water Authority, and Scott Peters of the San Diego Unified Port District.

**Action:** This item was presented for discussion only.

8. **UPCOMING MEETINGS**

The next meeting of the Regional Planning Committee is scheduled for May 1, 2009, at 12 noon.

9. **ADJOURNMENT**

Chair Janney adjourned the meeting at 1:57 p.m.

Attachment: Attendance Sheet
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REVISIONS TO SHORELINE PRESERVATION WORKING GROUP CHARTER

Introduction

The Shoreline Preservation Working Group (Working Group) was formed in the 1980s. Currently, its primary responsibility is to advise the Regional Planning Committee (RPC) on issues relating to the implementation of the adopted Shoreline Preservation Strategy and opportunities for beach replenishment. The Working Group consists of elected officials from the region’s coastal cities as well as technical and community advisors.

At its April 2, 2009, meeting the Working Group recommended that the RPC approve changes to its charter relating to SANDAG policy regarding membership and Working Group chair selection.

Recommendation

The Regional Planning Committee is asked to approve revisions to the Shoreline Preservation Working Group Charter that would formalize the selection of the Chair and add a tribal representative as an advisory member.

Discussion

At the March RPC meeting, Chairman Johnny Hernandez, representing the Southern California Tribal Chairmen’s Association (SCTCA), asked the Committee to consider the addition of a tribal representative to the Shoreline Preservation Working Group. Chairman Hernandez informed the Committee that SCTCA recommends that Chairman Louis Guassac be considered to serve on the Working Group to represent the SCTCA. Based on this request, the Working Group recommended modifying the Charter to allow the inclusion of a tribal representative from SCTCA to the Working Group roster in an advisory capacity.

In addition to the change in membership, the selection criteria and process of the Working Group’s Chair and Vice Chair has been modified. The Working Group Chair is appointed by the Chair of the Board of Directors and should be a primary member of the RPC or the SANDAG Board. The selection of the Vice Chair is done at the first meeting subsequent to the appointment of the Working Group Chair. The Vice Chair must be a primary voting member of the Working Group.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments: 
1. Shoreline Preservation Working Group Charter
2. Shoreline Preservation Working Group Membership Roster

Key Staff Contact: Shelby Tucker, (619) 699-1916, stu@sandag.org
Shoreline Preservation Working Group Charter

Purpose

The Shoreline Preservation Working Group (Working Group) was formed as a committee in the 1980s and currently provides input to the Regional Planning Committee on issues related to the implementation of the Shoreline Preservation Strategy (Strategy) adopted by SANDAG in 1993. The Strategy proposes an extensive beach building and maintenance program for the critical shoreline erosion areas in the region, including specific recommendations on the beach building program and on financing and implementation. The Members of the Working Group have technical expertise and background knowledge of regional shoreline issues, which are useful in applying the principles and goals laid out in the Strategy and the SANDAG’s Regional Comprehensive Plan (adopted in 2004). Continuing to support the region’s ongoing and future beach nourishment efforts is a top priority for the Working Group. Additionally, in 1996, SANDAG enacted a shoreline monitoring program and the Working Group will continue to provide recommendations regarding oversee and implementation of this program.

Guiding Principles

- Commitment to unified approach for local decisions on sand replenishment;
- Address local needs and maximize positive regional impacts;
- Encourage cooperation and coordination;
- Contribute equitable fair share from local participants; and
- Promote opportunities for beach sand replenishment.

Line of Reporting

The Shoreline Preservation Working Group, established by the Board of Directors, reports to the Regional Planning Committee (RPC) on issues relating to the implementation of the Shoreline Preservation Strategy and the Regional Comprehensive Plan. Based on the Working Group’s input, the RPC makes policy recommendations to the SANDAG Board of Directors. Regular updates on Working Group activities should be made to the Regional Planning Committee to update them on current programs and projects and further strengthen the connection between the two groups.

Responsibilities

The Shoreline Preservation Working Group’s main responsibilities are to make recommendations to the RPC on issues related to the implementation of the adopted Shoreline Preservation Strategy and Regional Comprehensive Plan, focusing on future beach nourishment opportunities and the shoreline monitoring program.

Membership

The Shoreline Preservation Working Group has 11 voting members, who are elected officials from the eight coastal cities in the San Diego region, the County of San Diego, and representatives from the San Diego Unified Port District and the U.S. Navy. Additionally, the Working Group has several advisory members, who are representatives from community groups and organizations, environmental groups, state and federal agencies, tribes, and other interested stakeholders. Voting members of the Working Group and their alternates are selected by the bodies they represent. Non-voting members of the Working Group are also selected by the bodies they represent and are categorized as either Technical or Community Advisors, who provide added knowledge and input to the Working Group. In the event of a lack of participation by a member of the Working Group or the group/agency the member represents, the Regional Planning Committee may approve allowing the Working Group to modify the membership roster in order to achieve a quorum and full participation.
Shoreline Preservation Working Group Charter

Meeting Time and Location

The Shoreline Preservation Working Group meetings are held bi-monthly at 11:30 a.m. on the first Thursday of every other month. Meetings are normally held in the 7th floor conference room at the SANDAG offices.

Selection of the Chair

The Chair of the Shoreline Preservation Working Group shall be appointed by the Board Chair of the SANDAG Board of Directors in February of each year, or as vacancies occur. The Working Group Chair shall be a primary member of the Board or a primary member of the Regional Planning Policy Advisory Committee to which the Working Group reports. The appointments shall go into effect immediately unless otherwise directed by the Board Chair.

Selection of the Shoreline Preservation Working Group’s Chair and Vice-Chair is done at the first meeting subsequent to the appointment of the Working Group Chair by the Board Chair, simultaneously and This process begins with recommendations made by Working Group members to select one of its primary voting members as the Vice Chair. The final decision is then made based on a vote of the Group’s voting members.

Duration of Existence

The Shoreline Preservation Working Group was originally created as a committee in the 1980s. The Working Group’s current status is that of a standing working group that reports to the Regional Planning Committee. An evaluation of the group’s work will be conducted annually as part of the SANDAG Executive Committee’s annual committee/working group review process of all lower level SANDAG committees and working groups.
SHORELINE PRESERVATION WORKING GROUP

MEMBERSHIP

This standing working group advises the Association on issues related to the adopted Shoreline Preservation Strategy and opportunities for beach replenishment. It has elected officials from the coastal cities and representatives from community groups, property owners, environmental groups, state and federal agencies, and Scripps Institution of Oceanography.

The Shoreline Preservation Working Group generally meets the first Thursday of every other month at 11:30 a.m.

Staff contact: Shelby Tucker, (619) 699-1916; stu@sandag.org

CHAIR

Pam Slater-Price  
Supervisor, County of San Diego

VICE CHAIR

Joe Kellejian  
Mayor, City of Solana Beach

MEMBERS

Carrie Downey  
Mayor Pro Tem, City of Coronado

Al Ovrom  
Councilmember, City of Coronado

Mark Filanc  
Councilmember, City of Del Mar

Crystal Crawford  
Mayor, City of Del Mar

Jim Janney  
Mayor, City of Imperial Beach

Lorie Bragg  
Councilmember, City of Imperial Beach

Esther Sanchez  
Councilmember, City of Oceanside

Jack Feller  
Councilmember, City of Oceanside

Kevin Faulconer  
Councilmember, City of San Diego

Donna Frye  
Councilmember, City of San Diego

James Bond  
Councilmember, City of Encinitas

Teresa Barth  
Councilmember, City of Encinitas

Ann Kulchin  
Mayor Pro Tem, City of Carlsbad

Dave Roberts  
Deputy Mayor, City of Solana Beach

Eileen Maher  
San Diego Unified Port District

Mitch Perdue  
U.S. Navy

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<tr>
<td><strong>Dedi Ridenour</strong></td>
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<td>Sierra Club</td>
</tr>
<tr>
<td><strong>Louis Guassac</strong></td>
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<tr>
<td>Southern California Tribal Chairmen’s Association (SCTCA)</td>
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</tbody>
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<table>
<thead>
<tr>
<th><strong>TECHNICAL ADVISORS</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Loni Adams</strong></td>
</tr>
<tr>
<td>State Department of Fish &amp; Game</td>
</tr>
<tr>
<td><strong>Robert Hoffman</strong></td>
</tr>
<tr>
<td>National Marine Fisheries Service</td>
</tr>
<tr>
<td><strong>Vacant</strong></td>
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<tr>
<td>U.S. Environmental Protection Agency</td>
</tr>
<tr>
<td><strong>Vacant</strong></td>
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<tr>
<td>U.S. Department of Fish and Wildlife</td>
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<tr>
<td><strong>Heather Schlosser</strong></td>
</tr>
<tr>
<td>U.S. Army Corps of Engineers</td>
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<td>San Diego Regional Water Quality Board</td>
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<tr>
<td><strong>Lee McEachern</strong></td>
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<td>California Coastal Commission</td>
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<tr>
<td><strong>Jane Smith</strong></td>
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<td>State Lands Commission</td>
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<tr>
<td><strong>Kim Sterrett</strong></td>
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<tr>
<td>State Dept. of Boating &amp; Waterways</td>
</tr>
<tr>
<td><strong>Darin Smith</strong></td>
</tr>
<tr>
<td>State Department of Parks and Recreation</td>
</tr>
</tbody>
</table>
Introduction

In December 2008, SANDAG issued a call for projects for the first two-year cycle of the TransNet Smart Growth Incentive Program. SANDAG received 43 project applications: 17 for planning grants and 26 for capital grants. After an initial screening, 35 of the 43 applications were determined to be eligible to compete for funding based upon the program eligibility requirements. SANDAG staff, with assistance from an independent evaluation panel, have reviewed and scored the projects according to project evaluation criteria developed through the Regional Planning Committee (RPC) and adopted by the Board of Directors. Based on that process, and the amount of funding available, staff is recommending eight capital improvement projects and seven planning projects be funded in the first cycle. This report describes the evaluation process and the projects recommended for funding.

Discussion

SANDAG has estimated that the total funding available for the first two-year cycle of the TransNet Smart Growth Incentive Program (FY 2009 and FY 2010) will be $9.6 million. The applications submitted included $25.2 million for capital projects and $4.5 million for planning projects for a total request of $29.7 million. Based on program eligibility criteria, capital improvement projects must be located within smart growth opportunity areas identified as “existing/planned” on the SANDAG Smart Growth Concept Map. Seven projects did not meet that criterion and were disqualified. In addition, one of the proposed projects, the Grossmont Trolley Station Elevator and Pedestrian Bridge, which was previously funded through the Pilot Smart Growth Incentive Program, was requesting additional funds under the TransNet program to cover a shortfall that developed since the original grant funds were awarded. As the project evaluation process was underway, the SANDAG Board of Directors decided to meet this project’s funding needs with economic stimulus funds made available through the American Recovery and Reinvestment Act. Taking these eight projects out of the competition resulted in 35 projects totaling $22.6 million competing for the $9.6 million available.

Recommendation

The Regional Planning Committee is asked to recommend that the Transportation Committee and Board of Directors approve the recommended list of projects for funding as shown in Attachments 1 and 2 of this report under the first cycle of the TransNet Smart Growth Incentive Program.
Project Selection Process

The 35 eligible projects were evaluated based on the established criteria developed through an extensive stakeholder involvement process that was established by the RPC. Planning and capital projects were evaluated on separate criteria. The criteria for capital improvements includes a set of objective criteria based on the land use and transportation characteristics of the project setting, project readiness, cost-effectiveness, and the level of matching funds committed to the project. The projects also were judged on subjective criteria regarding the smart growth qualities of the proposed project area and on the quality of the proposed project. The planning projects were scored on the smart growth qualities and development potential of the project area, on the proposed project and how well it addressed the project area’s needs, and on evidence of the local commitment to smart growth. Evaluation points also were awarded to planning projects for proximity to regional transit services and on the level of matching funds committed to the project.

To ensure impartial scoring, the subjective criteria were scored by an independent panel consisting of SANDAG staff, planning faculty from San Diego State University, the University of California, San Diego, a representative from the San Diego Council of Design Professionals, and one member each from the Cities/County Transportation Advisory Committee (CTAC) and the Regional Planning Technical Working Group (TWG). The CTAC and TWG members of the panel were from Poway and Santee, jurisdictions that did not submit projects for funding.

As required for some competitive grant programs at SANDAG, 25 percent of the available points in the evaluation matrix were awarded to projects based on the local jurisdiction’s support of regional affordable housing needs as prescribed in SANDAG Policy No. 033.

The list of recommended projects was reviewed by the Independent Taxpayer Oversight Committee to ensure that all the projects recommended for funding are eligible under the TransNet Ordinance. Based on that review and their unanimous action, all the projects are eligible under this program.

Meeting Program Objectives

The process of developing the TransNet Smart Growth Incentive Program began with the RPC establishing a set of objectives for the program. How well the project selection process met the objectives can only be fully judged once the funded projects have been completed and an evaluation of how the project has influenced additional investments in their communities can be performed. However, a preliminary assessment of how well the project selection criteria identified projects that meet those objectives can be made. Attachment 3 provides a brief assessment of how well the recommended projects fulfill the program objectives.

Project Recommendations

Under the guidelines established for the program by the RPC, at least 80 percent of the funds should be awarded to capital improvement projects. The eight highest-scoring capital projects would consume $7,554,900 of the available funding, leaving $2,035,669. The next capital project on the list is requesting $2 million, so funding that project would leave only $35,669 for planning projects, which is not enough to fund any of the planning projects on the list. Consequently, the staff recommendation is to fund the top eight capital projects, utilizing 79 percent of the funds, leaving $2,035,669 for planning projects.
The top six planning projects have requested grants totaling $1,860,000, which would leave an additional $175,669 not programmed. The next two projects on the list have the same score and are both from the City of San Diego. These additional funds could be programmed for one or both of these projects if the City of San Diego can identify additional matching funds that would enable them to complete the project or projects as proposed. Alternatively, the $175,669 could be held in reserve for the next funding cycle. Staff is recommending that the City of San Diego be given the opportunity to identify additional matching funds so that one of these projects could be completed as submitted.

Next Steps

Under SANDAG Board Policy No. 001, the Transportation Committee is responsible for approving all TransNet-funded projects. Therefore, the next step in the process is to take the RPC recommendation to the Transportation Committee to formally approve funding for the recommended projects. That action is scheduled for the May 15 Transportation Committee meeting. As new projects are added to the TransNet Program of Projects, they must also be approved by the SANDAG Board, and that action is scheduled for the May 22 meeting. Assuming the projects are approved as recommended by the RPC, staff would begin establishing the grant agreements with local agencies in June. In addition, staff will undertake a more detailed analysis of the project selection process to ensure the program is meeting the RPC’s objectives, and to identify any areas where improvements to the process are possible. A report on that evaluation will come back to the RPC before the next funding cycle.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments: 1. TransNet Smart Growth Incentive Program Capital Project Funding Recommendations
2. TransNet Smart Growth Incentive Program Planning Project Funding Recommendations
3. Program Objectives Analysis
4. Smart Growth Incentive Program Capital Project Evaluation Criteria Matrix
5. Smart Growth Incentive Program Planning Project Evaluation Criteria Matrix

Key Staff Contact: Stephan Vance, (619) 699-1924, sva@sandag.org
**TransNet Smart Growth Incentive Program**  
Capital Project Funding Recommendations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project Description</th>
<th>Score</th>
<th>SGIP Funds Requested</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of National City</td>
<td>8th St. Corridor Smart Growth Revitalization</td>
<td>219</td>
<td>$2,000,000</td>
<td>$3,500,000</td>
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<tr>
<td>City of San Diego</td>
<td>Park Blvd./Essex St. Pedestrian Crossing and Traffic Calming</td>
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<td>224,000</td>
<td>320,000</td>
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<tr>
<td>City of San Diego</td>
<td>Park Blvd./ City College/San Diego High Ped and Transit Access Improvements</td>
<td>189</td>
<td>300,000</td>
<td>429,000</td>
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<tr>
<td>City of San Diego</td>
<td>Fourth Ave./Quince Pedestrian Crossing and Traffic Calming</td>
<td>188</td>
<td>233,000</td>
<td>333,000</td>
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<tr>
<td>City of Chula Vista</td>
<td>Industrial Blvd. Bike Lane &amp; Pedestrian Improvements</td>
<td>178</td>
<td>283,900</td>
<td>429,200</td>
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<tr>
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<td>3,070,000</td>
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<td>City of San Diego</td>
<td>4th and 5th Ave./Nutmeg Ped Crossing and Traffic Calming</td>
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<td>$619,000</td>
<td>885,000</td>
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**Total Recommended Funding**  
$7,554,900 $14,033,200

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project Description</th>
<th>Score</th>
<th>SGIP Funds Requested</th>
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<tbody>
<tr>
<td>City of La Mesa</td>
<td>Downtown Streetscape Project</td>
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<tr>
<td>City of San Marcos</td>
<td>Creekside Dr. Construction Project</td>
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<tr>
<td>City of Oceanside</td>
<td>Coastal Rail Trail - Tyson St. to Oak St</td>
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<td>City of Chula Vista</td>
<td>Palomar Street Pedestrian Improvements</td>
<td>155</td>
<td>122,000</td>
<td>122,000</td>
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<tr>
<td>City of Vista</td>
<td>South Santa Fe Infrastructure Improvements</td>
<td>154</td>
<td>2,000,000</td>
<td>11,823,240</td>
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<tr>
<td>City of Oceanside</td>
<td>Mission Ave. Improvements</td>
<td>153</td>
<td>1,000,000</td>
<td>2,000,000</td>
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<td>City of Encinitas</td>
<td>Parking Lot B Project</td>
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<td>1,200,000</td>
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<td>City of San Diego</td>
<td>Oceanfront Walkway Pedestrian Improvements</td>
<td>138</td>
<td>1,552,000</td>
<td>1,800,000</td>
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<td>City of La Mesa</td>
<td>La Mesa Blvd./El Cajon Blvd. Intersection Improvements</td>
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<td>$465,000</td>
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**Total**  
$18,073,900 $38,631,030

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<th>FY 2010 Funds</th>
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<td>$4,772,610</td>
<td>$4,817,959</td>
<td>$9,590,569</td>
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**Minimum 80% Capital Funds**  
$7,672,455

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<tr>
<th></th>
<th>Recommended Capital Projects</th>
<th>Recommended Planning Projects</th>
<th>Total</th>
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<tr>
<td></td>
<td>$7,554,900</td>
<td>$2,035,669</td>
<td>$9,590,569</td>
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</table>

**Total Requested Funds (Capital and Planning)**  
$22,614,900

**Amount Over-Subscribed**  
$13,024,331
**TransNet Smart Growth Incentive Program**  
Planning Project Funding Recommendations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project Description</th>
<th>Score</th>
<th>SGIP Funds Requested</th>
<th>Total Cost</th>
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<tbody>
<tr>
<td>City of San Diego</td>
<td>Mid-City SR 15 BRT Station Area Planning Study</td>
<td>152</td>
<td>$225,000</td>
<td>$450,000</td>
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<tr>
<td>City of San Diego</td>
<td>Chollas Triangle Master Plan</td>
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<td>$275,000</td>
<td>555,000</td>
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<tr>
<td>Chula Vista</td>
<td>Palomar Gateway District Specific Plan and EIR</td>
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<td>$400,000</td>
<td>550,000</td>
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<tr>
<td>City of San Diego</td>
<td>Euclid and Market Village Master Plan</td>
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<td>$400,000</td>
<td>440,000</td>
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<td>Oceanside</td>
<td>Oceanside Blvd. Corridor Specific Plan and EIR</td>
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<td>$160,000</td>
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<tr>
<td>City of San Diego</td>
<td>Imperial Ave. and Commercial St. Corridor Plan</td>
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**Total Recommended Funding**  
$1,860,000  $3,364,000

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<tr>
<td>City of San Diego</td>
<td>Mid-Coast South Station Area Plan</td>
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<td>City of San Diego</td>
<td>San Ysidro Blvd. Mobility and Village Plan</td>
<td>135</td>
<td>250,000</td>
<td>500,000</td>
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</table>

**Potentially Funded Projects**  
City of San Diego Mid-Coast South Station Area Plan 135 400,000 660,000
City of San Diego San Ysidro Blvd. Mobility and Village Plan 135 250,000 500,000

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project Description</th>
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<th>SGIP Funds Requested</th>
<th>Total Cost</th>
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<tr>
<td>Chula Vista</td>
<td>E St. Transit Focus Area Precise Plan and Implementation Strategy</td>
<td>133</td>
<td>155,000</td>
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<tr>
<td>San Marcos</td>
<td>General Plan Update to Support Smart Growth Communities</td>
<td>125</td>
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<td>Oceanside</td>
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<td>Chula Vista</td>
<td>East Urban Center Transit Optimization Study</td>
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<tr>
<td>El Cajon</td>
<td>Downtown Photo simulations</td>
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<td>80,000</td>
<td>108,000</td>
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<td>La Mesa</td>
<td>Spring Street Station Smart Growth Implementation Plan</td>
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<td>Carlsbad</td>
<td>Carlsbad Barrio Land Use Study</td>
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<td>175,000</td>
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<tr>
<td>City of Imperial Beach</td>
<td>Palm Avenue Corridor Master Plan</td>
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<td>265,000</td>
<td>337,000</td>
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<tr>
<td>County of San Diego</td>
<td>Valley Center Rural Villages Master Plan</td>
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<td>400,000</td>
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<td>Del Mar</td>
<td>Village Center District Specific Plan and Form Based Code</td>
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<td>200,000</td>
<td>400,000</td>
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**Not Recommended for Funding**  
City of San Diego Mid-City SR 15 BRT Station Area Planning Study 152
City of San Diego Chollas Triangle Master Plan 146
Chula Vista Palomar Gateway District Specific Plan and EIR 138
City of San Diego Euclid and Market Village Master Plan 138
Oceanside Oceanside Blvd. Corridor Specific Plan and EIR 138
City of San Diego Imperial Ave. and Commercial St. Corridor Plan 136

**Total**  
$4,541,000  $7,380,350

**Total TransNet Funding Available**  
$9,590,569

**Maximum 20% Planning Funds**  
$1,918,114

**Total Recommended for Planning Projects**  
$1,860,000

**Total Recommended for Capital Projects**  
$7,554,900

**Remainder Available for Potential Projects**  
$175,669

**Total Planning Funding with Potential Projects**  
$2,035,669
Program Objectives Analysis

- Fund projects that are “ready-to-go” to put good examples of smart growth development on the ground as catalysts for further development.

As required by the program guidelines, all of the recommended projects propose schedules that would enable the capital projects to be under construction within 18 months and the planning projects underway within one year. The program’s use-it-or-lose-it policy will provide a mechanism to ensure projects stay on schedule.

- The projects should influence land development by improving the public realm and encouraging private smart growth projects that, in combination, create great places.

How the communities develop as a result of these projects will have to be judged over time. However, new development is proposed in the vicinity of all the recommended capital projects, and the recommended planning grants will enable or facilitate the land use and urban design changes necessary to foster smart growth development and great place-making.

- The projects should contribute to the reduction of greenhouse gases by encouraging travel by means other than private automobile. In particular, the projects should support public transit usage by being within areas served by transit, and by improving access to transit.

The impact of these projects on trip-making will have to be judged over time, but all the recommended capital projects propose enhancements to the pedestrian environment. Two projects include improvements specifically for bicycle travel, and two others include bicycle parking improvements. Because all of these projects are either proximate to a regional LRT station or an area served by high-quality local transit service, they will improve access to public transit. All the recommended planning projects will lead to land use changes that allow higher density around public transit services or produce strategies to help implement that development.

- The projects should support housing development at densities appropriate for its place type.

Zoned densities in the areas surrounding the recommended capital projects exceed the minimum thresholds for their smart growth place types by factors ranging from two to six, and there currently are 639 entitled housing units in the project areas.

- The projects should provide good examples of smart growth in a variety of settings in the region.

The recommended capital and planning projects are in five of the seven established smart growth place types, including one in the Metropolitan Center, two in Urban Centers, three in Town Centers, three in Mixed-Use Transit Corridors, and four in Community Centers. None of the recommended projects are within a Special Use Center (no applications) or Rural Village (one application received). With respect to the geographic distribution, most of the recommended projects are within the City of San Diego and South County Subregions. One project recommended for funding is located in the East County Subregion and one in the North County Coastal Subregion.
## Smart Growth Incentive Program
### Capital Project Evaluation Criteria Matrix

<table>
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<tr>
<th>Points</th>
<th>Points Possible</th>
<th>Weight</th>
<th>% of Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. LAND USE AND TRANSPORTATION CHARACTERISTICS OF THE AREA AROUND THE PROPOSED CAPITAL IMPROVEMENT PROJECT</td>
<td></td>
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<td></td>
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</tbody>
</table>

#### A. Intensity of Planned Development in the Project’s Smart Growth Opportunity Area (maximum 6 points)*
- **For Metropolitan Center, Urban Centers & Town Centers**
  - 3 Exceeds minimum residential requirements by 100% or more
  - 2 Exceeds minimum residential requirements by 50-99%
  - 1 Exceeds minimum residential requirements by 25-49%
  - 3 Exceeds minimum employment requirements by 100% or more
  - 2 Exceeds minimum employment requirements by 50-99%
  - 1 Exceeds minimum employment requirements by 25-49%

#### B. Existing and Entitled Land Development Around the Proposed Capital Project

1. **Existing Development Density within ¼ mile radius of proposed capital project site (maximum 6 points)**
   - **For Metropolitan Center, Urban Centers & Town Centers**
     - 3 Exceeds minimum residential requirements by 100% or more
     - 2 Exceeds minimum residential requirements by 50-99%
     - 1 Exceeds minimum residential requirements by 25-49%
     - 3 Exceeds minimum employment requirements by 100% or more
     - 2 Exceeds minimum employment requirements by 50-99%
     - 1 Exceeds minimum employment requirements by 25-49%

2. **Entitled Development Density within ¼ mile radius of proposed capital project site (maximum 6 points)**
   - **For Metropolitan Center, Urban Centers & Town Centers**
     - 3 Exceeds minimum residential requirements by 100% or more
     - 2 Exceeds minimum residential requirements by 50-99%
     - 1 Exceeds minimum residential requirements by 25-49%
     - 3 Exceeds minimum employment requirements by 100% or more
     - 2 Exceeds minimum employment requirements by 50-99%
     - 1 Exceeds minimum employment requirements by 25-49%

#### C. New Affordable Housing Development (maximum 3 points)
- % of income restricted affordable housing provided in proposed new development (Within ¼ mile radius of project site)
- 3 100% of units affordable
- 2 10-29% of units affordable
- 1 10% or less of units affordable

#### D. Transportation Characteristics (within walking distance of proposed capital improvement project)
1. **Relation to Transit (maximum 12 points)**
   - Scale of actual walking distance to existing or programmed transit hub
   - Project abuts or is on site to a Regional or Corridor service station or a Transit Center
   - Project is within ¼ mile of a Regional or Corridor service station or a Transit Center
   - Project is within ¼ mile of a stop for a high frequency (15 min all day) local bus service and at least two additional bus services (transit hub)
   - Project is within ¼ mile of a stop for a high frequency (15 min all day) local bus service (within ¼ mile radius of project site)

2. **Bicycle facilities** (up to 2 points based on quality and utility)
3. **Walkability measured by intersection density** (up to 4 points)
4. **TDM strategies existing or proposed** (2 points)
**Smart Growth Incentive Program Guidelines and Call for Projects – FY 2009 to 2010**

1. **Transit station or hub qualifies if corresponding implementation or construction funding has been programmed in the RTIP.**

2. **Transit hub will be defined as an intersection of three or more bus routes, where at least one route has a minimum scheduled headway of 15 minutes from 7 a.m. to 7 p.m.**

3. **Regional service is defined as COASTER or freeway-based Bus Rapid Transit.**

4. **Corridor service is defined as SPRINTER, Trolley, and arterial-based Rapid Bus.**

5. **All day is defined as 7:00 a.m. to 7:00 p.m.**

6. **Bike facilities will be defined as bike lanes, bicycle boulevards, or a designated bike path.**

7. **TDM strategies can include transit pass programs for employees or residents in the area, vanpool/carpool programs, parking cashout programs for employees, car, or bike sharing programs, or shuttle services to rail stations or major destinations.**

8. **Support is defined as endorsement of community planning groups, business associations, and community development corporations in the project area.**

* Score to be computed by SANDAG based on current land use and transportation databases.

---

### E. Community Design Features (within 1/4 mile radius of project site)

**1. Urban Design Characteristics and Community Context (maximum 6 points)**

Project review panel scoring based on existing community structure and design characteristics in project area, and planned or proposed design characteristics in the area based on documented guidance such as design guidelines for area or jurisdiction, form-based codes, or renderings of proposed development. Consideration also given to the appropriate mix of land uses in the project area.

**2. Sustainability**

Where existing or entitled buildings in the project area include sustainable building principles, add 2 points.

**3. Universal Design**

Where existing or entitled buildings in the project area include universal design features, add 2 points.

---

### II. QUALITY OF PROPOSED CAPITAL IMPROVEMENT PROJECT

(Scale: 5=excellent, 4=very good, 3=good, 2=fair, 1=minimal benefit, 0=no improvement)

**A. Support for Public Transit (maximum 5 points)**

How well does the project support use of regional public transit service in the project area?

**B. Providing Transportation Choices (maximum 5 points)**

How well does the project support transportation choices that would reduce vehicle miles traveled, such as walking and bicycling?

**C. Community Enhancement (maximum 5 points)**

How well does the proposed project contribute to the enhancement of the public realm in the project area to engender support for smart growth?

**D. Addressing Project Area Issues (maximum 5 points)**

How well does the proposed project address identified special needs of the community such as improving access and public safety?

---

### III. PROPOSED CAPITAL IMPROVEMENT PROJECT READINESS (maximum 5 points)

**A. Major Milestones Completed (maximum 3 points)**

1. Environmental Clearance
2. Right-of-Way Acquisition
3. Final Design

**B. Evidence of Local Commitment (maximum 2 points)**

Demonstrated Community Support*

Subtotal

---

### IV. COST EFFECTIVENESS (ratio of grant request to project score (maximum 20 points))

Project grant request (Example: $2,000,000)

Grant request divided by project evaluation points (Example: $2,000,000 divided by 185 = $10,811)

All projects graded on a curve from most to least matching funds.

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<tr>
<th>IV. MATCHING FUNDS</th>
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<td></td>
<td>20</td>
<td>7%</td>
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<tr>
<th>VI. POLICY NO. 433 POINTS</th>
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<td></td>
<td>75%</td>
<td>25%</td>
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**TOTAL PROJECT SCORE**

300% 100%
1. Relation of Proposed Planning Area to Regional Transit (weight factor: 3, maximum points: 15, 7.5%)

Transit Infrastructure and Service within Smart Growth Opportunity Area (SGOA)

a. SGOAs with existing regional or corridor transit infrastructure (5 points)

b. SGOAs with programmed regional or corridor transit infrastructure or existing high frequency local transit infrastructure and service (3 points)

c. SGOAs with planned regional or corridor transit infrastructure, or programmed or planned high frequency local transit infrastructure and service (1 point)

Note: Rural Villages would not be scored on this criterion because the place type does not require transit service. Consequently, Rural Village scores would be normalized to the total 200 points available to other place types. The following criteria will be scored on a 5-point scale as follows:

5=excellent, 4=very good, 3=good, 2=adequate (some deficiencies), 1=marginal benefit, 0=no benefit.

Guidance on how to apply the criteria to applications will be provided for the evaluation panel in the program guidelines.

2. Development Potential of Proposed Planning Effort Area (weight factor: 4, maximum points: 20, 10%)

Evidence of opportunities to develop smart growth plans or projects in the proposed planning area: Can the area appropriately accommodate smart growth? Is there land available for redevelopment or rezoning? Would the existing urban form support smart growth development? How well does the proposed planning effort support development at or above the intensity of use targets for the area’s smart growth place type?

3. Planning Project Objectives (weight factor: 3, maximum points: 20, 10%)

How well do the proposed project objectives support smart growth development in the project area? Would the plan result in development that increases transportation and housing choices?

4. Proposed Method of Meeting Project Objectives (weight factor: 5, maximum points: 30, 15%)

How does the proposed project plan to accomplish stated objectives? How well does the proposed project scope of work facilitate meeting project objectives? Does the scope of work include significant public outreach?

5. Implementation (weight factor: 5, maximum points: 35, 17.5%)

Will the proposed planning process lead to timely change in the project area? Is the planning process ready to go? Will it result in regulatory mechanisms that facilitate smart growth or lead directly to an implementable development or capital project? In particular, is a plan is in place, or will the project develop a plan that will facilitate smart growth development through a master EIR or other mechanism that allows for administrative approval of development projects? Does the plan area include significant environmental concerns that may delay or prevent successful implementation of the plan?

6. Evidence of Local Commitment and Community Support (weight factor: 4, maximum points: 10, 5%)

How has the jurisdiction or agency demonstrated a commitment to implement smart growth? This commitment may be demonstrated through existing ordinances, policies, or incentives. Is the proposed planning project supported by the community? How will the public participation process help develop consensus for smart growth?

7. Matching Funds (up to 20 points, 10%)

The project will receive points in proportion to the percentage of proposed matching funds to total project cost.

8. Percentage of Lower Income Housing Units per RHNA (up to 50 points, 25%)

Up to 25 percent of total allowable points, based on amount of affordable housing produced as a percentage of the agency’s annualized affordable housing target.

Total points available equal 200
Introduction

On September 26, 2008, the SANDAG Board of Directors approved a process and criteria for funding eligible land management activities under the TransNet Environmental Mitigation Program (EMP) for Fiscal Year 2009. A total of $1.63 million was made available for land management activities related to: (1) invasive species control, (2) post-fire wildfire recovery, (3) habitat restoration, and/or (4) access and litter control. The Request for Proposals stated that projects that are not ready to start within 12 months of submission of the application (January 30, 2009) to SANDAG would not be eligible for this funding cycle.

Pursuant to SANDAG Board of Directors approval, a “call for projects” was issued on December 1, 2008, and 29 applications totaling over $7.1 million were received on January 30, 2009. Twenty-seven of the projects proposed activities related to one or more of the four eligible activities.

Discussion

On November 13, 2008, the EMP Working Group appointed an ad hoc evaluation committee to review the land management grant applications, which were received by SANDAG on January 30, 2009. This ad hoc committee consisted of Bruce April, Mike Grim, James Whalen, David Mayer, Susan Wynn, Anne Harvey, and was chaired by Thomas Oberbauer from the EMP Working Group. In addition, two outside, independent biologists with natural resource management experience participated in the evaluation. These outside experts were Bill Tippets of the County Water Authority and Ms. Dawn Lawson from Camp Pendleton.

The evaluation committee met on February 25, 2009. The individual evaluation committee rankings were then pooled, collectively reviewed, and their merits and shortcomings were discussed. A recommendation for project eligibility was provided to the Independent Taxpayer Oversight Committee (ITOC) and a prioritized list of recommended projects was provided to the EMP Working Group.

Recommendation

The Regional Planning Committee is asked to recommend that the Board of Directors: (A) approve the prioritized list of land management projects and funding allotments (Attachment 1), and (B) authorize staff to enter into contracts for the selected grants in the proposed allocations totaling $1.63 million.
The resulting recommended list of projects described on the attached spreadsheet is geographically distributed in the region and well represented by various types of organizations from larger agencies and jurisdictions to small non-profit land managers. It should be noted that some of the projects ranked numerically higher than others but are not being recommended due to limitations of the project. The rationale for this is outlined in Attachment 1. In some cases, the entire request is being recommended for funding. In other cases, the ad hoc committee is recommending a reduced amount.

**ITOC Review**

On April 8, 2009, the list of grant applications was reviewed by the ITOC and recommended unanimously that 27 of the 29 projects are consistent with the TransNet Environmental Mitigation Program eligibility requirements as established by the SANDAG Board of Directors.

Projects that did not receive any funding, or less than the requested amount, are encouraged to resubmit for next year’s grant funding. The prioritizations and recommendations from the ad hoc committee are provided as Attachment 1.

BOB LEITER  
Director of Land Use and Transportation Planning

Attachment: 1. Funding Recommendations for Proposed Land Management Grant Projects

Key Staff Contact: Keith Greer, (619) 699-7390, kgr@sandag.org
### Funding Recommendations for Proposed FY 09 Land Management Grant Projects

<table>
<thead>
<tr>
<th>Tracking #</th>
<th>Project</th>
<th>Activities Proposed</th>
<th>Final Overall Rank</th>
<th>Requested Funding</th>
<th>Recommended Funding</th>
<th>Discussion/Conditions</th>
</tr>
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<tbody>
<tr>
<td>12</td>
<td>City of Carlsbad, Parks and Recreation Department - Calavera Preserve Planning Area</td>
<td>The purpose of this project is to provide access control, habitat restoration, and public outreach for the 735-acre Calavera Preserve Planning Area, located in the northeast quadrant of the City of Carlsbad.</td>
<td>1</td>
<td>$286,667</td>
<td>$286,667</td>
<td>Fund restoration and access control.</td>
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<tr>
<td>14</td>
<td>Zoological Society of San Diego &amp; City of San Diego Water Department - Wild Animal Park</td>
<td>We propose to support and enhance the survival of coastal cactus wrens in San Pasqual Valley by: (1) enhance 45 acres of damaged cactus scrub within the Wild Animal Park MSCP through cacti enrichment plantings, (2) construct a cactus propagation and salvage center that will serve as a long-term resource providing native cacti materials for restoration projects throughout the North County, (3) propagate over 1,200 prickly-pear cacti per year for restoration in the San Pasqual Valley and (4) monitor cactus wren abundance, distribution, and habitat use in relation to habitat enhancement to verify project success.</td>
<td>2</td>
<td>$341,153</td>
<td>$325,290</td>
<td>Fund, with condition that they apply overhead only on personnel costs only - not on materials and other direct costs.</td>
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<td></td>
<td>Organization</td>
<td>Description</td>
<td>Amount</td>
<td>Status</td>
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<td>2</td>
<td>California Wildlife Foundation - Rancho Jamul Fencing</td>
<td>The goals of this project is to prevent trespass by off-road vehicles and the further degradation of sensitive habitat managed by Cal Fish and Game within Proctor Valley by installation of steel barriers in concrete footings.</td>
<td>$393,043</td>
<td>Fund with condition that the applicant obtains private property owners permission to build fence prior to BOD approval and they identify strategic locations along Proctor Valley road starting from the terminus of the City Water Department fencing project.</td>
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<tr>
<td>28</td>
<td>San Diego River Conservancy - San Diego River in Cities of San Diego, Santee and County of San Diego</td>
<td>Integrated project of (1) invasive species control and restoration, (2) access control and fencing, (3) Park patrol and clean up and (4) planning future restoration by outreach to property owners.</td>
<td>$721,072</td>
<td>Not recommended for funding. Large project that would require significant matching funds. Matching funds of $1,095,620 have been proposed, but frozen by the state. Recommend reapply next cycle when applicant knows status of matching funds.</td>
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<tr>
<td>16</td>
<td>San Dieguito River Valley Conservancy - Hodges East &amp; San Pasqual Valley</td>
<td>This request is for TransNet EMP funding to continue annual treatment of pepperweed for three years and biological monitoring of sensitive species. It also includes funding to purchase a carrier vehicle to allow materials to be delivered for habitat restoration and trail construction activities as well as a handheld data collection device for tracking invasive occurrences.</td>
<td>$267,350</td>
<td>Fund exotic removal and biological monitoring.</td>
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<td>8</td>
<td>City of San Diego Water Department - Upper Otay Watershed Restoration</td>
<td>The projects propose to restore and enhance native riparian and upland habitat along 4.5 miles of Dulzura, Jamul, and Proctor Creeks in the Upper Otay Watershed. Habitat at all three sites has been compromised by successive wildfires in 2003 and 2007.</td>
<td>6</td>
<td>$271,901</td>
<td>$0</td>
<td>Not recommended for funding. The project is contingent upon receiving state grant funds of $5,554,804. The grant funds have been applied for but not approved. Recommend reapply next cycle when applicant knows status of matching funds.</td>
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<td>1</td>
<td>Center for Natural Lands Management - Rancho La Costa, TET, Meadowlark</td>
<td>The Project Proposal requests funding to remove non-native plant species from several preserves owned and managed by the Center for Natural Lands Management. The species targeted are extremely invasive and threaten the preserves and continue to degrade habitat quality and impact sensitive species.</td>
<td>7</td>
<td>$90,229</td>
<td>$55,010</td>
<td>Fund Phase I with deletion of $19,000 for removal of eucalyptus trees.</td>
</tr>
<tr>
<td>15</td>
<td>Southwest Wetlands Interpretive Association - Tijuana River Valley Regional Park</td>
<td>Southwest Wetlands Interpretive Association (SWIA) seeks funding for: (1) Treatment of non-native, invasive plants within 212 acres of prime riparian habitats; (2) Revegetation of riparian scrub and riparian woodland with native species; (3) Continued involvement of the 23-member Technical Advisory Group; (4) Monitoring of project success through treatment-effectiveness monitoring; and (5) Public outreach in the form of updated kiosk displays and signage.</td>
<td>7</td>
<td>$820,000</td>
<td>$0</td>
<td>Not recommended for funding. A spring treatment has been funded by an EMP grant ($149,437). A proposed fall treatment is not considered critical. Recommend applicant reapply next cycle.</td>
</tr>
<tr>
<td>Project Description</td>
<td>Expected Benefits</td>
<td>Funding Request</td>
<td>Outcome</td>
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<td><strong>Batiquitos Lagoon Foundation - Mitsuuchi Property</strong></td>
<td>The purpose of this project is to restore and enhance native habitats, and stabilize the heavily eroded bluff, provide for safe public access, and to support, promote, educate, and engage the public in environmental matters at the former Mitsuuchi Parcel in the Batiquitos Lagoon Ecological Reserve. Another key purpose is to provide for properly managed public access for recreational and environmental educational purposes.</td>
<td>$67,138</td>
<td>Fund restoration and access control effort.</td>
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<tr>
<td><strong>San Elijo Lagoon Conservancy - Multiple in Carlsbad Hydrologic Unit</strong></td>
<td>The San Elijo Lagoon Conservancy proposes to treat the invasive plants on these sites with herbicide, reduce or remove the resulting biomass as appropriate, revegetate the sites, and continue retreatments at these sites for two additional years.</td>
<td>$299,860</td>
<td>Not recommended for funding. Currently applicant has three years of funding ($279,950). Not recommended to expand efforts in this area during this cycle.</td>
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<tr>
<td><strong>Back Country Land Trust of San Diego County - Wright’s Field MSCP Preserve</strong></td>
<td>Erosion repair and restoration project, completion of the perimeter fence and surveys for the Hermes copper and Quino checkerspot butterflies.</td>
<td>$81,690</td>
<td>Fund completion of fencing and recovery plans - initial fencing paid for by TransNet EMP grant. No funding recommended for restoration of erosion control during this cycle.</td>
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<tr>
<td><strong>City of Chula Vista - Salt Creek</strong></td>
<td>5 year restoration of cactus wren habitat in Salt Creek by reduction of competing shrubs with coast cholla patches.</td>
<td>$297,580</td>
<td>Not recommended for funding. County San Diego has grant to restore same area. Determine what areas County proposes to fund and recommend reapply next cycle.</td>
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<td></td>
<td>Project Name</td>
<td>Description</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>Notes</td>
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<td>3</td>
<td>Friends of Los Penasquitos Preserve - Black Mtn. Open Space Park and Santa Luz Grasslands</td>
<td>The Friends of Los Peñasquitos Canyon Preserve, in partnership with the City of San Diego will restore 5-6 invasive grass sites, totaling a net 25 acres, to coastal sage scrub and succulent sage scrub in a project to be phased in over 5 years. The focal species of the project are the Cactus wren and California gnatcatcher.</td>
<td>$71,604</td>
<td>$190,000</td>
<td>$60,998</td>
<td>Not recommended for funding. Not a known area for cactus wren. Restoration of this area not critical.</td>
</tr>
<tr>
<td>4</td>
<td>California Invasive Plant Council</td>
<td>Development of the state’s first regional framework for strategic invasive plant management. The project brings together three interrelated planning components to be initiated concurrently, as well as a pilot implementation project. The planning components are (1) guiding the collection of baseline invasive plant distribution data, (2) conducting detailed impact assessments for regionally important invasive plants, and (3) developing a Strategic Plan to guide immediate management.</td>
<td>$0</td>
<td>$150,000</td>
<td>$60,998</td>
<td>Fund with the eliminations of the two proposed pilot projects. Lowers needed funding by $40,000.</td>
</tr>
<tr>
<td>7</td>
<td>City of Oceanside, Department of Public Works - Myers Property</td>
<td>3.5 acres of remediation and restoration of unauthorized trails and sources of erosion and sedimentation are proposed for the 35-acre Myers Property in the City of Oceanside, California.</td>
<td>$0</td>
<td>$60,998</td>
<td>$60,998</td>
<td>Fund conditioned that a letter of commitment to enforce unauthorized uses be included in contract.</td>
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<td></td>
<td>Description</td>
<td>Proposed Expense</td>
<td>Match</td>
<td>Recommendation</td>
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<td>21</td>
<td>River Partners and the County of San Diego Department of Parks &amp; Recreation - Hollenbeck Canyon (a.k.a. Daley Ranch)</td>
<td>$105,697</td>
<td>$0</td>
<td>Not recommended for funding. Same company as proposal #8. Proposal has less allocated matching funding and match is an unsecured state grant.</td>
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<td>22</td>
<td>County of San Diego Department of Parks &amp; Recreation - Barnett Ranch Preserve, Rancho Jamul and Diego National Wildlife Refuge</td>
<td>$187,500</td>
<td>$0</td>
<td>Not recommended for funding. Research project not eligible.</td>
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<tr>
<td>27</td>
<td>San Pasqual River Restoration - San Pasqual Valley</td>
<td>$35,000</td>
<td>$0</td>
<td>Not recommended for funding. Received $45,000 last year. Unclear what additional work would be needed.</td>
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<tr>
<td>19</td>
<td>County of San Diego Department of Parks &amp; Recreation - Lusardi Creek Open Space Preserve</td>
<td>$256,000</td>
<td>$0</td>
<td>Not recommended for funding. High cost for culvert construction ($156,000). May lead to more access for unauthorized uses.</td>
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<td>Project Description</td>
<td>Budget</td>
<td>Funding Status</td>
<td>Recommendation</td>
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<td>20</td>
<td>Enhance the habitat within the Boulder Oaks Preserve to eventually support Pacific pond turtles</td>
<td>$156,680</td>
<td>$0</td>
<td>Not recommended for funding. Not a known area for western pond turtles. Genetic work still being done. Premature to indicate that this area should be focus of pond turtle relocation.</td>
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<td>10</td>
<td>The project proposes to restore and enhance 4.75 acres of native Diegan coastal sage scrub habitat (California sagebrush dominated) south of Lake Hodges in an effort to encourage the return of the 2007 pre-fire California gnatcatcher and cactus wren populations.</td>
<td>$115,170</td>
<td>$0</td>
<td>Not recommended for funding. Cultural resource protection project not as critical for biological resources.</td>
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<td>11</td>
<td>Proposal to use a combination of biodiversity surveys, population genetic analyses, and specialized habitat modifications to study key aspects of the recovery of small animal populations following fires. Use of genetic analyses to determine how population structure of focal species is affected by fire and the degree to which recovery comes from survival of local individuals versus immigration of individuals from unburned areas.</td>
<td>$196,334</td>
<td>$0</td>
<td>Not recommended for funding. Research project not eligible</td>
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<td>#</td>
<td>Project Description</td>
<td>Details</td>
<td>Budget</td>
<td>Recommended Status</td>
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<td>5</td>
<td>Bureau of Land Management - Dulzura QCB Occurrence Complex</td>
<td>The Bureau of Land Management (BLM) Palm Springs - South Coast Field Office is proposing to restore Quino checkerspot butterfly habitat on federal lands within the Dulzura QCB occurrence complex (Southwest San Diego Recovery Unit). These lands were burned in the 2003 Otay and 2007 Harris wildfires and are gradually converting from native annual grasslands and open coastal sage scrub habitat to dense non-native grasslands.</td>
<td>$258,200</td>
<td>Not recommended for funding. QCB not a covered species. High cost to benefit ratio.</td>
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<td>9</td>
<td>City of San Diego Water Department - Jamul Creek Access</td>
<td>The project proposes to install a 90-foot clear-span railcar bridge, with pre-cast concrete abutments, over an unnamed stream channel that flows from Otay Mountain into Jamul Creek.</td>
<td>$91,710</td>
<td>Not recommended for funding. Access enhancement for Border Patrol. Not related to access control to minimize impacts for biological resources.</td>
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<td>25</td>
<td>32nd Street Canyon Task Force, c/o Groundwork Chollas - 32nd Street Canyon, Golden Hill</td>
<td>Non-native abatement our natural areas require to become more sustainable, and restoration, at 32nd Street Canyon, in San Diego's community of Golden Hill.</td>
<td>$392,352</td>
<td>Not recommended for funding. Urban canyons not as biologically significant as other areas.</td>
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<td>23</td>
<td>County of San Diego Department of Parks &amp; Recreation - Lindo Lake, Lakeside California</td>
<td>Preparation of a detailed sediment removal plan and permitting for the restoration of Lindo Lake.</td>
<td>$109,000</td>
<td>Not recommended for funding. Urban lake with water quality focus.</td>
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<tr>
<td>26</td>
<td>Rincon Band of Luiseno Indians - Rincon Reservation</td>
<td>Development of a native plant nursery and revegetation of habitat burned in 2003 and 2007 wildfires.</td>
<td>$60,000</td>
<td>Not recommended for funding. Other projects were considered more critical.</td>
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<td>Fire recovery on the Rincon Reserve to address the clearing and cleaning of debris and unwanted vegetation in natural drainages burned during the 2003 and 2007 wildfires and subject to severe erosion.</td>
<td>28</td>
<td>$749,850</td>
<td>$0</td>
<td>Not recommended for funding. Focus on flood control, not improvements to biological resources.</td>
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<tr>
<td>6</td>
<td>Rincon Band of Luiseno Indians</td>
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<tr>
<td>29</td>
<td>Pauma Band of Mission Indians - Pauma Mission Reserve</td>
<td>Re-seed and plant vegetation, trees, remove burnt debris, clear brush, repair and maintain roads to and from reserve and to eliminate or at least reduce the potential for down stream flooding extending to Pauma Creek.</td>
<td>29</td>
<td>$150,000</td>
<td>$0</td>
<td>Not recommended for funding. Focus on flood control, not improvements to biological resources.</td>
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<tr>
<td>TOTAL:</td>
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<td>$7,123,778</td>
<td>$1,630,000</td>
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San Diego Association of Governments

REGIONAL PLANNING COMMITTEE

May 1, 2009

AGENDA ITEM NO.: 6

Action Requested: RECOMMEND

FINAL DRAFT SMART GROWTH DESIGN GUIDELINES File Number 3000200

Introduction

Last February, staff presented the draft smart growth design guidelines, Designing for Smart Growth, Creating Great Places in the San Diego Region, to the Regional Planning Committee (RPC) for comment. The RPC provided feedback at that time and approved the staff recommendation to release the document for public review. SANDAG received substantial comments from a number of local agencies as well as from the general public. The comment period ended at the beginning of April, and since then the staff and consultant team have been reviewing the comments received, and revising the document as appropriate.

This report transmits the final draft version of Designing for Smart Growth to the RPC, and provides a report on the public review process.

Recommendation

The Regional Planning Committee is asked to recommend that the SANDAG Board of Directors accept the final draft Designing for Smart Growth, Creating Great Places in the San Diego Region for distribution.

Discussion

Development of the Smart Growth Design Guidelines

Designing for Smart Growth is one component of SANDAG’s smart growth toolkit that will be a resource for local agencies, planning and designing professionals, and interested citizens. It was developed as a strategic initiative of the Regional Comprehensive Plan, which recognized that good urban design appropriate to its setting is a critical factor for making the plan’s smart growth strategy successful in the region. The guidelines were developed with the assistance of an ad hoc working group that consists of members from the Regional Planning Technical Working Group (TWG), Cities/County Transportation Advisory Committee (CTAC), and the Stakeholders Working Group from the last Regional Transportation Plan update. Two well-attended public workshops held early in the process also helped to shape the document.

SANDAG contracted with the firm of Design Community and Environment (DC&E) from Berkeley, California, to help develop the design guidelines. Their team includes Kimley-Horn and Associates (KHA) for the transportation engineering component of the work and KTU+A for planning and outreach. KHA provided both a local perspective and national experience with context-sensitive design for multimodal transportation. KTU+A provided a local perspective on planning and the
smart growth place types, and assisted with the public outreach effort. Finally, William Fulton of Solimar Research, which was recently acquired by DC&E, assisted with development of the smart growth scorecard. The scorecard provides a useful evaluation tool for SANDAG and local agencies when evaluating smart growth development proposals.

Comment Review Process

SANDAG recorded over 200 individual comments received on the document. In general, the comments were supportive of the guidelines overall, providing feedback on how individuals intend to utilize them at their agency or in their practice. Most of these comments focused on specific details of the document, and these comments assisted in final refinements and improvements to the document. There were cases where comments or suggested changes were not incorporated into the final draft, which are described below.

There was interest from several sources in having the document include guidance on parking rates in smart growth areas. Getting the parking right is critical to making smart growth places work, and, for this reason, the traffic engineers on the consultant team cautioned against including generic parking supply recommendations that might be inappropriate in some settings, or that could be inappropriately applied. SANDAG is currently conducting a study of trip generation and parking demand in smart growth settings that should provide more detailed guidance on parking that could be incorporated into Designing for Smart Growth once it is completed later this year.

A few comments were beyond the scope of this document. For example, there were comments on the level of transit service and comments on parking management strategies and parking technologies. Both of these topics are important to the overall smart growth strategy and the document does touch on these subjects. However, these ideas warrant careful attention in other contexts and specific implementation recommendations are beyond the scope of the design guidelines.

Finally, because Designing for Smart Growth was developed to provide local agencies with guidance on how development standards might be modified in smart growth areas, it is inevitable that some of the recommendations will be different than existing local practices. However, there is nothing in the guidelines that is not in current practical use either in the San Diego region or around the country. The engineering professionals on the consultant team have reviewed all the recommendations to ensure the recommendations in the document can be implemented and do not create unsafe conditions. Finally, Designing for Smart Growth is intended only as guidance and as a reference to best practices. Nothing in the document should require a local agency to adopt any of its recommendations.

Next Steps

With the RPC recommendation to accept the document, Designing for Smart Growth will be presented to the SANDAG Board of Directors for acceptance. With the Board’s approval, the document will be distributed in printed form as well as electronically through the SANDAG Web site and on compact disks. Based on the feedback received during the process of developing the guidelines, it has been made known that local agencies, design schools, and designing and
development professionals are eagerly awaiting the final document so that the concepts can be incorporated into current work efforts.

BOB LEITER
Director of Land Use and Transportation Planning

Attachment: 1. Final Draft Designing for Smart Growth, Creating Great Places in the San Diego Region (Provided to RPC members only; available to others upon request.)

Key Staff Contact: Stephan Vance, (619) 699-1924, sva@sandag.org
SAN DIEGO ASSOCIATION OF GOVERNMENTS

REGIONAL PLANNING COMMITTEE

May 1, 2009

AGENDA ITEM NO.: 7

Action Requested: RECOMMEND

ESTABLISHING THE REGIONAL PLANNING STAKEHOLDERS WORKING GROUP

File Number 3000200

Introduction

The passage of Senate Bill (SB) 375 and provisions included in the 2008 RTP Settlement Agreement (Settlement Agreement) regarding the 2030 Regional Transportation Plan Environmental Impact Report (EIR) significantly change how SANDAG will prepare the next Regional Transportation Plan (RTP) and Regional Housing Needs Assessment (RHNA). Both also set the stage for a future update of the Regional Comprehensive Plan (RCP). SANDAG staff has responded to these new requirements in the draft FY 2010 Budget and Overall Work Program.

SANDAG regularly involves the public in regional planning efforts. A public participation plan is being prepared to involve the public in every step along the way to develop the 2050 RTP and set the stage for a future RCP update. Among other public involvement efforts, the plan will include the establishment of a new Regional Planning Stakeholders Working Group (SWG) to provide input on the development of key work elements in the planning process, including the public participation plan itself. Additionally, there will be a series of public workshops and other means for involving the public and receiving input on the work products and the draft 2050 RTP.

The purpose of this report is to outline the proposed roles and responsibilities for the SWG and the proposed process for selecting and appointing members.

Discussion

Consistent with adopted policies, SANDAG promotes active public participation in the development and implementation of our regional plans and programs. Typical public participation tools used include open houses, community workshops, websites, and public meetings. SANDAG also has routinely used working groups as one of the components of an effective public participation program.

In February 2005, the Board of Directors appointed a stakeholders working group to advise and provide input on the 2030 RTP, approved in November 2007. Similarly, in December 2002, the Regional Planning Committee (RPC) appointed a working group to directly involve regional stakeholders interested in contributing to the preparation of the RCP; that group completed its work with the adoption of the RCP in July 2004.

Recommendation

The Regional Planning Committee is asked to recommend that the Board of Directors approve: the establishment of the Regional Planning Stakeholders Working Group and its charter; issue the call for membership applications; and appoint two members to serve on the selection committee.
Relationship among SANDAG Board, Policy Advisory Committees, and Working Groups

The proposed Regional Planning SWG would act in an advisory capacity to both the RPC and Transportation Committee on the development of the 2050 RTP and its components, and laying the foundation for the next RCP update. The following figure illustrates the relationships among the Board, Policy Committees, and Working Groups, and their primary responsibilities leading to adoption of the 2050 RTP.

A Unique Role

The purpose of the SWG will be to review and provide input into development of the 2050 RTP leading to adoption of the 2050 RTP in July 2011 and setting the stage for a future update of the RCP. Specific activities are listed in Attachment 2. Additionally, the SWG members will be asked to assist with public outreach to help inform and encourage active public participation by outside groups with which they may be affiliated.

The SWG provides a unique opportunity for SANDAG to involve citizens with expertise in policy areas of regional interest as well as individuals who reflect the demographics of the region, with particular emphasis on communities that are not traditionally involved in the regional planning processes. Most of the SANDAG working groups are comprised of representatives from local jurisdictions, appointed by those jurisdictions based on their position (e.g., local planning directors make up the Regional Technical Working Group and local public works directors make up the Cities/County Transportation Advisory Committee).

Although there are now federal and state laws in place to ensure compliance with Title VI of the 1964 Civil Rights Act, the spirit and purpose of Executive Order 12898 (Environmental Justice) was to
encourage federal, state, regional, and local governments to go beyond basic legal requirements.\(^1\) SANDAG defines environmental justice as ensuring that regional plans, policies and actions do not disproportionately negatively affect low income and minority communities. The guidelines set forth encourage public agencies to be proactive and continually improve their programs and processes to support the involvement of minority and low income populations in the planning process. Good regional planning should be inclusive. As SANDAG is constantly striving to be more inclusive, some methodological innovations to the structure of the SWG are being proposed as described below.

**Recommended Membership**

It is proposed that the SWG include up to 25 members and that the structure include two categories of membership:

1. **At-Large Citizen Representatives (16-18 members):** The at-large citizen representatives with experience in various subject matter areas will provide broad input on a wide variety of areas through their individual experience in multiple types of organizations. These individuals will not be representing a specific organization, but rather will be drawing on their civic or professional expertise in a set of subject matters areas relevant to this planning process (e.g., transportation, housing, environmental health, economic prosperity, public health, and urban form). Up to 4 at-large members should be appointed from various minority organizations with countywide constituent bases (e.g., Chicano Federation of San Diego County, Council of Native American Organizations of San Diego County, San Diego Alliance for Asian Pacific Islanders). This will serve as a nexus to incorporate the issues and concerns of minority communities on a regional basis in the planning process, one of the objectives of federal Title VI and environmental justice requirements.

2. **Individuals from Community-based Networks in communities identified as low-income/minority (5-7 members):** Individuals from a community-based network or collaborative would serve as a conduit for coordinated outreach to the selected communities and provide a community-based perspective. A community-based network or collaborative is made up of a variety of social institutions, including social service providers, ethnic associations, schools, churches, chambers of commerce, and other community-based organizations within the identified low-income/minority communities (See Attachment 3).\(^2\) In an effort to engage these communities early in the planning process, SANDAG staff is working to establish a mini-grant program to tie the SWG directly to their concerns and opinions in a timely and meaningful way. These five to seven slots are being reserved for successful competitors in the mini grant program.\(^3\) One of the tasks in the mini grant scope of work for the outreach grant will be to participate as members of the SWG.

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\(^1\) To the greatest extent practicable and permitted by law, and consistent with the principles set forth in the report on the National Performance Review, each Federal agency shall make achieving environmental justice part of its mission by identifying and addressing, as appropriate, disproportionately high and adverse human health or environmental effects of its programs, policies, and activities on minority populations and low-income populations in the United States and its territories and possessions, the District of Columbia, the Commonwealth of Puerto Rico, and the Commonwealth of the Marian islands.

\(^2\) The criteria for the identification of Environmental Justice communities are based on the current forecasting model for the 2030 RTP with Trip Distribution Zones (TDZ) as the unit of analysis. Those TDZs with a minority population of at least 65 percent were classified as ‘minority’ TDZs. Low-income TDZs were defined as those where at least one-third of the households are projected to have an income of less than $30,000 per year in 2030. This methodology resulted in approximately 17 percent of the households in the region classified as low-income in 2030.

\(^3\) Funding for the proposed mini-grant program is included in the $150,000 set aside for outreach for SCS/RTP process included in the draft FY 2010 Budget.
Selection Process

Recruitment – Staff recommends that membership applications and credentials be solicited from groups that have shown an interest in the RTP, RCP, and other related projects; groups identified by the RPC and Transportation Committee; and from the general public through advertisements in community newspapers, postings at local jurisdictions, public service announcements on TV, and Internet postings.

Applications – A sample application form is attached for the Regional Planning Committee’s consideration (Attachment 4).

Selection Criteria – Criteria should include balancing the group by geography and interests, maximizing the number of groups the member is associated with, skills and abilities, experience with regional planning issues, and a demonstrated commitment to serve.

Selection Committee – The RPC and the Transportation Committee would each appoint two of its members to review applications. In addition, two members each from RPTWG and CTAC would review applications. The RPC and Transportation Committee would be asked to recommend the SWG slate to the Board of Directors.

Reappointment Process – A waiting list for possible replacements will be developed at the same time as the selection process. If an SWG member misses three meetings, s/he would be replaced by someone on the waiting list. All efforts will be made to ensure that the profile of the replacement reflects similar characteristics as the original member.

Termination of Working Group – The group would complete its work with the adoption of the comprehensive 2050 RTP (anticipated in the summer 2011).

Leadership – The Chair of the SWG would be an elected official appointed by the Board of Directors. The SWG will be asked to appoint two Co-Chairs that will serve as the advisory members to the RPC and Transportation Committee.

Next Steps

If recommended for approval by the RPC and Transportation Committee, the Board of Directors will be asked to approve the Charter for the Regional Planning SWG and authorize a call for membership applications at one of its May meetings. Applications would be reviewed during June and the RPC and Transportation Committee would be asked to recommend the SWG slate to the Board of Directors at the July meetings.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments: 1. Draft Regional Planning Stakeholders Working Group Charter
2. Proposed Regional Planning Stakeholders Working Group Summary of Activities
3. Map of Environmental Justice Communities in San Diego Region
4. Draft Regional Planning Stakeholders Working Group Application

Key Staff Contact: Jane Clough-Riquelme, (619) 699-1909, jcl@sandag.org
PURPOSE
The purpose of the Regional Planning Stakeholders Working Group (SWG) is to review and provide input into key activities associated with the development of the 2050 Regional Transportation Plan (RTP) and its components, and laying the foundation for the next Regional Comprehensive Plan (RCP) update. The SANDAG Board of Directors approved the creation of the SWG on (insert date).

LINE OF REPORTING
The SWG will act in an advisory capacity to both the Regional Planning Committee (RPC) and Transportation Committee on specific 2050 RTP activities, as discussed in the next section. The RPC and Transportation Committee in turn report to the SANDAG Board. The SANDAG Board makes final decisions on the 2050 RTP and its components.

RESPONSIBILITIES
The SWG will review and provide input into development of the 2050 RTP and activities that will lead to the adoption of the 2050 RTP and lay the foundation for the next RCP update. These activities include but are not limited to the development of the 2050 Regional Growth Forecast, Sustainable Communities Strategy (SCS), Regional Housing Needs Assessment (RHNA), Urban Core Transit Strategy and the RTP/SCS Public Participation Plan. The SWG will also assist with associated public outreach and help inform and encourage active public participation by outside groups. In general, the SWG's focus will be on regionwide planning activities.

MEMBERSHIP
The SWG has up to 25 voting members. The voting members were approved by the Board on (insert date). The members were selected based on either their individual qualifications as citizen experts or their role as a community leader. Voting members do not have alternates. If a member misses three meetings in a row or four meetings over the course of one year, s/he will be replaced. In the event that any members need to be replaced, new members will be selected from the approved waiting list.

MEETING TIME AND LOCATION
The SWG will meet on a monthly basis. Meetings will typically be held on the third Tuesday of the month from 4 - 6 p.m. at the Caltrans District 11 offices on Taylor Street in San Diego.

WORKING GROUP LEADERSHIP
The Chair of the SWG was appointed by the SANDAG Board of Directors on (insert date). The SWG will elect co-chairs by a majority vote who will serve as advisory members to the RPC and Transportation Committees, respectively.

DURATION OF EXISTENCE
The SWG will complete its work with the adoption of the 2050 RTP (anticipated in summer 2011).
Proposed Regional Planning Stakeholders Working Group (SWG)  
DRAFT- Summary of Activities

2050 Regional Transportation Plan (RTP)  
In accordance with state and federal guidelines, the 2050 RTP is slated for adoption by the SANDAG Board of Directors in July 2011. The SWG will be asked to provide input on development of the 2050 RTP and its key components, including the vision, goals, and objectives; transportation project evaluation criteria; and performance measures. Other major tasks include input on the development of network alternatives and economic analysis of investment strategies.

2050 Regional Growth Forecast  
The 2050 regional growth forecast is being produced to reflect the most current economic, demographic, land use and transportation data for use in the RTP. The SWG will be asked to review the results of the draft Forecast and to weigh in on the alternative growth scenarios that will be produced as part of the forecast process.

Urban Core Transit Strategy  
An Urban Core Transit Strategy will be developed that evaluates possible regional transit strategies that maximize peak-period transit mode share in the urban core. The strategy will result in three to four long-range strategic transit network alternatives that will be factored into the 2050 RTP. The SWG will be asked to provide input on the network alternatives.

Sustainable Communities Strategy (SCS) / Regional Housing Needs Assessment (RHNA)  
The SCS will be a new element of the RTP, as required by Senate Bill 375, to show how regional greenhouse gas targets would be achieved through development patterns, infrastructure investments, and/or transportation measures or policies that are determined to be feasible. Additionally, the SCS must be consistent with the RHNA and must address protection of sensitive resource areas, including areas protected under Habitat Conservation Plans (HCPs). The SWG will be asked to assist in the development of the SCS and provide input on its various elements.

Public Participation Plan  
The SWG will be asked to provide input on a public participation plan for the 2050 RTP. The goal of the plan is to involve the public in every step along the way to develop the 2050 RTP and set the stage for a future RCP update. There will be a series of public workshops and other means for involving the public and receiving input on the work products and draft 2050 RTP.

May 1, 2008
APPLICATION FORM FOR SANDAG’S
2009-2011 REGIONAL STAKEHOLDERS WORKING GROUP

(due XXXXX, 2009)

Name: _________________________________
Address: ______________________________
________________________________________
Phone:_________________________________
E-mail:______________________________

Return to:
Jane C. Riquelme, Senior Regional Planner
San Diego Association of Governments
401 B St., Suite 800
San Diego, CA 92101
jcl@sandag.org
(619) 699-1909

[ ] Citizen Expert in Policy Area(s)  [ ] Representative of Minority Organization
[ ] Representative of Community Collaborative/Network/Council

(Please make responses as concise as possible; applications will not be judged on length of response)

1. Why are you interested in serving on the Regional Planning Stakeholders Working Group?

2. What skills and abilities would you bring to the Stakeholders Working Group?

3. Which of the following topics are of interest to you? (please select no more than three)

[ ] Urban Form (land use & community design)  [ ] Social Equity & Environmental Justice  [ ] Transportation

[ ] Housing  [ ] Economic Development/Prosperity  [ ] Public Facilities

[ ] Climate Change/Environmental Protection  [ ] Border Issues (binational, tribal, and interregional)  [ ] Other
4. Have you participated in any activities related to the areas of interest selected in Question 3? If so, briefly describe the activity/ies.

5. What would you hope to accomplish by your participation?

6. What zip code(s) do you work in and/or live in?

7. List any civic organizations to which you belong now, or have in the past.

The Regional Stakeholders Working Group will meet the third Tuesday of each month from 4 to 6 p.m. at the Caltrans District 11 offices in Old Town. There will be childcare available.

Members of the working group will be replaced if they miss three consecutive meetings or five over the course of one year. Please only apply if you can make this commitment to the process.
Introduction

SANDAG and the California Energy Commission entered into a multi-year agreement that assists SANDAG with developing, expanding, or updating our energy planning products in order to meet mutual state and regional energy goals. SANDAG also was tasked with developing transferable tools and resources, based on our energy planning efforts, which could be used by other metropolitan planning organizations or councils of government to address regional energy issues.

The Sustainable Region Program (SRP) Action Plan and Toolkit are the first set of tools delivered to the Energy Commission as part of our agreement. The Energy Commission accepted the documents for use in the state to provide guidance that other regional governments can use to implement similar energy-saving programs. The Action Plan and Toolkit were developed in partnership with the Energy Commission, California Center for Sustainable Energy (CCSE), and San Diego Gas and Electric (SDG&E). They also will be used in the region when SANDAG expands the Sustainable Region Program to all member agencies through a Local Government Partnership with SDG&E (anticipated January 2010).

Discussion

The SANDAG SRP is an energy-saving program that provides technical assistance and staff support to member agencies that either have not participated or have minimally participated in regional energy efficiency, renewable, and green building programs available to them. The SRP addresses energy-saving measures for existing buildings and new construction as well as policy measures that local governments can adopt. Policy measures have expanded to include potential ways to integrate energy efficiency, renewable energy, and climate change considerations into General Plan elements, municipal codes, and other standards. A final product for each local government is an energy management plan, or “energy roadmap,” tailored to their needs.

SRP is an expansion of a pilot program undertaken with the City of Carlsbad in 2005 and 2006. The program was developed in partnership with CCSE and implemented by SANDAG with CCSE and SDG&E. Through the SANDAG-California Energy Commission partnership, the SRP expanded to assist three additional cities in 2007 and 2008. SANDAG is eager to expand the SRP to assist all member agencies once supplemental resources are acquired.
In addition to the Sustainable Region Program, the Energy Commission partnership helps SANDAG:

- Update the San Diego Regional Energy Strategy,
- Develop a Regional Climate Action Plan, and
- Prepare an assessment of alternative fuels, vehicles, and infrastructure for local government fleet applications.

As these products are developed, they will be brought forward to the Regional Planning Committee and the Board of Directors.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments: 1. SANDAG Sustainable Region Program Action Plan
2. SANDAG Sustainable Region Program Toolkit

Key Staff Contact: Susan Freedman, (619) 699-7387, sfr@sandag.org
SANDAG Sustainable Region Program Action Plan

CEC Agreement Number: 160-06-002
SANDAG OWP: 3003002

Submitted by the San Diego Association of Governments to the California Energy Commission

November 4, 2008
Revised April 1, 2009

ACKNOWLEDGEMENTS

The SANDAG Sustainable Region Program is a joint effort with San Diego Gas & Electric, the California Center for Sustainable Energy (CCSE), and the California Energy Commission (CEC). It provides technical assistance and staff support to local governments that either have not participated or have participated minimally in regional energy efficiency, renewable and green building programs available.

This Action Plan was developed with assistance from CCSE and the CEC. It was prepared with the advice and assistance of the SANDAG Energy Working Group and the CEC State Advisory Task Force.
# TABLE OF CONTENTS

I. INTRODUCTION AND PROGRAM HISTORY ................................................................. 5  
   Sustainable Region Program Background ............................................................. 5  
   The Sustainable Region Program Today ............................................................... 7  
   Recommended Initial Steps .................................................................................. 7  

II. GETTING STARTED .................................................................................................. 9  
   Forming an Energy Team ...................................................................................... 9  
   Developing Energy Priorities and Goals .............................................................. 11  
   Programs and Projects ....................................................................................... 11  

III. MANAGING ENERGY INFORMATION .................................................................. 11  
   Collecting and Tracking Data ............................................................................. 12  
   Analyzing Data .................................................................................................. 13  
   Reporting Data .................................................................................................. 14  

IV. FACILITY ENERGY MANAGEMENT .................................................................... 14  
   Assessing Existing Facilities ............................................................................. 15  
   Long-Term Assessment Planning ..................................................................... 15  
   Developing Projects ......................................................................................... 16  
   Operations and Maintenance ........................................................................... 17  

V. NON-BUILDING INFRASTRUCTURE RECOMMENDATIONS ............................. 18  
   Exterior Lighting ............................................................................................... 18  
   Water and Wastewater ...................................................................................... 18  
   Recycling ......................................................................................................... 19  

VI. LAND USE AND TRANSPORTATION PLANNING ............................................ 19  
   The Energy and Climate Change Connection .................................................... 20  
   General Plans, Coastal Plans, and Codes and Standards .................................... 21  
   Transportation Initiatives .................................................................................. 22  

VII. DEVELOPING ENERGY SAVING POLICIES ..................................................... 23  
   Energy Program Funding ................................................................................... 23  
   Promoting Energy Efficiency and/or Reducing Greenhouse Gases .................... 23  
   Policies That Impact Energy Supply .................................................................. 25  

VIII. PROVIDING EMPLOYEE EDUCATION ............................................................ 26  
   Employee Education .......................................................................................... 27  
   Recognition and Awards .................................................................................... 27  
   Team Training ................................................................................................... 27  

IX. ADDITIONAL RESOURCES ............................................................................... 28
I. INTRODUCTION AND PROGRAM HISTORY

Energy is a major operating cost for most local governments; it also is a cost that can be mitigated through planning and the creation of best practices. Local governments can achieve lower energy costs without adversely affecting their staff or their ability to serve their constituents through participation in the Sustainable Region Program (SRP).

The SRP is offered by SANDAG, the San Diego region’s Metropolitan Planning Organization (MPO), to its Member Agencies. The SRP was designed to assist local governments in developing energy management plans and in implementing cost-saving energy measures. SANDAG has facilitated the SRP in the San Diego region with the help of the California Center for Sustainable Energy\(^1\) (CCSE) and San Diego Gas & Electric (SDG&E). The SRP addresses energy-saving measures for existing buildings through building energy audits and new construction through plan review, as well as energy and greenhouse gas (GHG) reducing policies. Policy measures can range from a recommendation for a green building program to ways to integrate energy efficiency and GHG reduction measures into General Plans or municipal codes and standards. A final product for each local government is an energy management plan, or “energy roadmap,” tailored to its needs.

SANDAG developed the SRP Action Plan and SRP Toolkit as part of its contract with the California Energy Commission (CEC). The SRP Action Plan and SRP Toolkit were developed as resources for other MPOs and Councils of Government (COGs) to use if they were interested in developing a similar energy-saving program in their region. This document also is distributed in the San Diego region to local governments interested in taking part in the SRP. The SRP Action Plan works in concert with the SRP Toolkit to provide both general guidance (SRP Action Plan) and specific tasks and templates (SRP Toolkit) to achieve program success.

Identifying and maintaining reliable funding is essential to long-term program sustainability and success. Local governments have responded to this need for consistent funding in a variety of traditional and creative ways. It is, however, important to realize that while there is fluctuation in the regional, state, and national economy, energy conservation, and climate change measures include economic benefits that accrue even for small investments.

Sustainable Region Program Background

The SRP was designed to assist local governments in developing energy management plans (roadmaps) and implementing cost-saving energy measures. It has been targeted at local governments without full-time energy staff and that have had little to no participation in the myriad of state public goods charge (PGC)-funded energy-efficiency programs available.

\(^1\) SANDAG has utilized the services of the CCSE through a Memorandum of Understanding entered into in 2004 under the CCSE original name, the San Diego Regional Energy Office.
For each local government, the SRP focuses energy and GHG reduction measures in three areas:

1. Existing municipally owned or occupied buildings
2. New municipal construction
3. Local government policies

The SANDAG Sustainable Region Program began in 2005–2006 with the City of Carlsbad Pilot. With assistance from the CEC, SANDAG was able to continue the SRP Pilot and offer services to two more member agencies in 2008. Subsequent to the CEC contract, the local utility, SDG&E, contributed additional staff and financial resources for SANDAG to again expand the SRP to two additional member agencies for a total of five over the course of the SRP to date. The participating cities are Carlsbad (2005–2006), Poway (2007–2008), Solana Beach (2007–2008), Imperial Beach (2008–2009), and Coronado (2008–2009).

The original SRP Pilot was a collaborative effort among SANDAG, CCSE, SDG&E, and the City of Carlsbad. SANDAG facilitated the effort and sought input and direction from its Energy Working Group (EWG). It was targeted at local governments that traditionally had not engaged in energy management activities. The SRP Pilot:

- Provided free technical and policy support to develop an energy management plan
- Assessed municipal energy needs
- Facilitated building energy audits at local government facilities
- Assisted in project development for energy efficiency installations
- Identified appropriate rebate and financing programs available to the city

Carlsbad received technical, policy, and educational assistance from SANDAG, CCSE, and SDG&E and participated successfully in each aspect of the program. The SRP Pilot assessed Carlsbad’s energy performance and identified almost $200,000 in available energy savings from feasible measures on existing buildings and new construction. Policy education also played a role in identification of potential savings for the municipality. Subsequent to the SRP Pilot, the City of Carlsbad has saved 489,571 kilowatt-hour (kWh) in energy consumption through local energy efficiency programs like the CCSE Tax Exempt Customer program.

Except for the staff time of the SRP Pilot facilitator, the majority of staff time from CCSE and SDG&E was utilized at no direct expense to SANDAG. The SRP Pilot’s time fell within its respective PGC-funded program parameters for various energy efficiency, demand response, onsite generation, green building, renewable energy, and energy education programs. The SRP Pilot facilitator sought input from the EWG throughout the SRP Pilot development and as the SRP Pilot progressed.

It should be noted that while the state and local governments face financial constraints due to various factors, the SRP Action Plan and accompanying SRP Toolkit offer ideas, solutions, and opportunities of value to local governments in terms of real savings to the extent energy conservation measures and policies are implemented.
The Sustainable Region Program Today

In keeping with recommendations in the 2007 CEC Integrated Energy Policy Report (IEPR) and the California Public Utilities Commission (CPUC) Energy Efficiency Strategic Plan, the SRP policy component now includes an assessment of energy and GHG reduction measures in General Plan elements and Coastal Plans. This effort began in 2008 with the City of Imperial Beach. SANDAG has sought long-term funding to expand the SRP to all of its member agencies and has been included in the Local Government Partnership (LGP) portfolio of SDG&E for the 2009–2011 program cycle. LGPs are part of the PGC-funded programs regulated by the CPUC. The “PGC” is a line item on ratepayer electric and gas bills and part of the ratepayer-funded PGC goes to energy efficiency programs through each utility. The funding iterations of the SRP are detailed in Step 1 of the SRP Toolkit, “Financing an SRP for Local Governments.”

Recommended Initial Steps

Several initial steps can prepare the MPO for a successful SRP rollout. They include the following tasks:

- Engage stakeholders
- Set regional and local energy priorities
- Public Education Process
- Feedback Mechanisms

Engage Stakeholders

Engagement of local stakeholders is critical to SRP success. Utility-based and third-party energy programs will provide valuable support to the local government’s energy retrofit project work. Relationships with staff in other municipalities will enable the local government to learn from peer experiences. Utility expertise in energy and load management, billing and accounts, and general familiarity with the energy business can prove invaluable in the planning and implementation of the SRP. Third-party providers of energy efficiency and other energy saving programs are valuable resources outside of the utility that also can guide the local government through the energy management process. Utility and third parties often offer incentives for energy installations and retrofits, reducing not only ongoing retrofit costs for the local government, but also the costs of developing an energy management program in the first place.

By leveraging existing program and staff resources, the SRP has been able to expand to address a wider range of energy issues and a larger number of local governments. SANDAG has strong working relationships with both the utility and CCSE and has partnered with both to ensure appropriate technical assistance. CCSE is a nonprofit based in San Diego, but it runs some statewide energy programs and can be contracted to assist entities across the state.
Set Regional and Local Energy Priorities

A participating local government should form a cross-departmental Energy Team and conduct preliminary research on regional and local energy, climate, and/or sustainability goals. The “energy team” is further detailed in Section II: Getting Started. Preliminary research can offer a clear sense of the energy picture in a service area and community, and enable the local government to better articulate its energy goals and priorities.

In 2003, SANDAG adopted its Regional Energy Strategy 2030 (RES) that set nine goals for saving energy and diversifying regional energy resources. SRP activities in each municipality are consistent with the RES. If no regional energy plan exists, beginning with the State’s Energy Efficiency Strategic Plan would be valuable. Regional and local energy policy should be consistent with state law and policy. The United States Department of Energy’s Energy Efficiency and Renewable Energy (USDOE EERE) Web site is another valuable resource.

Clearly defined goals will shape the structure of the local government’s energy roadmap, the structure of its Energy Team, and the resources needed. To be effective, the SRP should investigate:

- The larger vision and mission of the region and local government
- Regional attitudes and behavior toward energy use
- General information on energy efficiency, conservation, and clean onsite generation
- Any previous energy programs pursued by the local government
- Any existing resources, programs, and organizations that can be leveraged

Public Education Process

To guarantee SRP success, the MPO and participating local government should gain and maintain public support for the effort. As part of the Program, the local government should keep detailed information on energy savings and tangential benefits like utility bill reductions and associated GHG reductions. The SRP participants can compile that information into reports that can be disseminated to the appropriate local government staff, including those that can present the information to the public. Staff members tasked with marketing and outreach functions should relay the program benefits in lay terms. Education can be achieved through public education forums that showcase the progress and successes of the Program. Methods of delivery could include:

- Press release with quarterly updates on savings achieved
- E-Bulletins
- Conducting educational forums at Chambers of Commerce, Economic Development Councils, other inter-regional agencies, out-of-region agencies, trade associations, education (K-12 and college) staff meetings, and others
- Presentations to local government decision makers, including city councils and county boards of supervisors
• Local Government Partnerships

Performance Indicators

The “energy roadmap” involves the requisite details needed to measure the success or failure of the SRP while allowing the Energy Team to make decisions to address challenges and opportunities. The establishment of benchmarks or performance indicators as a way to track progress can include such things as regional attitudes and behaviors towards energy, current energy efficiency rates, current conservation rates, GHG rates, etc.

II. GETTING STARTED

This Action Plan provides a framework from which a local government can develop an energy roadmap or energy management plan as part of its participation in the SRP. The activities recommended will help set the course for effective and sustainable energy management, as well as provide flexibility to implement activities that best meet local government needs. The SRP Toolkit contains specific tasks and templates to assist in this process.

Forming an Energy Team

One challenge facing any energy program is obtaining general staff buy-in, as this topic falls outside the focus of most or all participating staff. Meeting this challenge requires a team of key participants who can reach a unified vision of the kind of energy activities the organization should undertake. This core group will form the local government’s Energy Team.

Successful teams increase collaboration, help build consensus, and allow those who will be affected to participate in the decision-making process. The team can help avoid problems by identifying difficulties during the project development stage and by ensuring that everyone who may be affected by a project understands the anticipated benefits.

In addition to local government staff, it is essential to build long-term political support for the SRP by including elected officials in the process. This will help develop reliable, ongoing support for energy planning.

A successful team should involve personnel from different departments. A team leader also should be chosen. Key participants include representatives from the following:

• Local Government Administration/Management Office – To facilitate policy changes and communications, especially with top-level decision makers and between departments.

• Facilities Management Specialist – To provide experience with the local government’s building stock and with current maintenance practices. This may be Public Works Department staff.

• Finance Department – To provide budgetary, accounting, and economic analysis. For example, if finance pays the local government’s energy bills, they can help identify buildings with the highest energy use.
- Engineering Department – To ensure high-levels of energy efficiency in facility planning, new construction and major retrofit projects, and to provide technology assessments.

- Site/Project Planning Department – To ensure that proposals are consistent with General Plans, codes and standards, or to identify any barriers to implementing energy efficiency and renewable energy measures. For example, building height limits sometimes present obstacles to the use of renewable energy systems.

- Redevelopment or Economic Development Functional Entities – To ensure that staff engages the Energy Team from a business and economic perspective.

Other Energy Team members may be added on a project or activity-specific basis. These members may be from legal, planning, human resources, purchasing and contracts, environmental, public works, and transportation and traffic departments. Outside of the Local Government Team, additional members should include a utility account executive, relevant third-party energy efficiency program administrators, and/or other specialists and consultants. (For more information on forming a Team, see SRP Toolkit Section 4, “Guide to Forming an Energy Team”)

Identifying an Energy Manager

The decision to hire an Energy Manager can happen subsequent to the SRP energy roadmap being completed, or concurrently. Smaller local governments with few municipal facilities and relatively uncomplicated needs can often allocate their energy management activities to existing facilities maintenance staff. This approach can be successful with assistance from energy engineering consultants and the local utility. Larger local governments that occupy multiple facilities will benefit from hiring an Energy Manager.

An Energy Manager is a full-time staff member whose responsibilities include:

- Researching, evaluating, and developing recommendations to address local government energy use

- Coordinating energy management activities within the local government’s subdepartments

- Championing new energy policy development and implementation throughout the local government

- Providing liaison with the local government’s energy providers

- Reporting back to local government decision makers

Typically, an Energy Manager will save more money through avoided energy costs than will be required to support the position. The best location within the local government for an Energy Manager is usually in a facilities management department, but there are examples of successful energy managers being located within other departments. However, it should be a prerequisite that the department where the Energy Manager is located is committed to actively supporting the local government’s energy goals.
Developing Energy Priorities and Goals

It is common for energy programs to have multiple priorities, such as reducing energy costs, saving energy, “greening a region,” improving local air quality, promoting renewable energy use, and conserving resources. While these priorities may change from year to year, the three priorities recommended for the Sustainable Region Program are:

- Reduce energy costs and increase efficiency by retrofitting existing facilities
- Ensure that all new facilities are built to a high standard of energy performance
- Local governments take ownership of their energy future

The challenge is to translate general priorities into specific program goals. Energy program goals should encompass what a local government wants to achieve from measured energy management efforts. Goal definitions are usually high-level and long-term; unfortunately, they often are defined so loosely that they appear abstract and open to interpretation. Clearly defined goals with metrics better serve an organization, for example:

“The Federal Government established an overall energy management goal that required all federal agencies to reduce the energy consumed in their buildings by 30 percent by the year 2005, and by 35 percent by 2010, compared to a 1985 baseline.”

This goal defines the target area (all federal local government buildings), a quantified result (30% below the 1985 level), and provides a stated time period in which the goal is to be achieved (by the year 2005). It is important, however, to recognize that goals are only as good as the implementation programs that support them and make them happen.

Programs and Projects

In order to support an organization’s energy management goals, it will be necessary to set up individual energy projects or develop multi-project implementation programs. Through SRP participation, a local government is able to identify energy projects, timelines, and resource needs.

Implementation programs and projects focus on achieving a municipality’s energy goals through measurable terms, with defined time periods for completion. When designing an energy program, it is important to clearly identify a strategic or long-term goal and short-term objectives. Typical quantifiable terms for measuring progress include: dollars saved, reductions in energy consumption and electric demand, percent of inefficient lights retrofitted, operation and maintenance time saved, program participation levels, etc.

III. MANAGING ENERGY INFORMATION

Developing a process to record, track, analyze, and report both the amount and cost of various energy resources is a critical component of local government energy management. Energy-related resources include electricity, electric demand, natural gas, propane, steam, compressed air, water and wastewater, and transportation fuels.

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2 USDOE Order DOE 0432.2A, April 15, 2002.
An effective energy accounting system can help identify areas with the greatest savings potential, indicate trends in energy use, help manage programs, measure progress towards goals, identify billing errors, and support better decision making. All of these items will help the energy program gain support. Two examples of energy tracking programs are Energy Star® Portfolio Manager and kWickview, which are discussed under the Energy Bills subheading shortly.

There are three major categories of activities associated with energy accounting systems:

- Collecting and tracking data
- Analyzing data
- Reporting data

**Collecting and Tracking Data**

The Team Leader should compile existing energy related information from all available sources. The objective is to collect, track and maintain the following information:

- Energy bills
- Building and facility data
- Energy supply information
- Local government policies and applicable government regulations

The tasks included in this section should be discussed in the Kickoff Meeting. They will involve interaction between the Team Leader, the energy engineer, and the utility representative. For a sample meeting agenda, see SRP Toolkit Section 5, “Kickoff Meeting.”

**Energy Bills**

The Team Leader should collect from the utility service provider the past one to three years of energy bills (more years if possible) for all facilities. The bills will provide information on energy use and costs, utility rates, and other charges, and utility metering practices. The Team Leader can contact the utility account representative or customer service department for assistance in interpreting the data. (See SRP Toolkit Appendix B. II. “Sustainable Region Program Questionnaire” and B. III. “Preliminary Assessment Questions for examples of collection procedure.)

The Team Leader should select a mechanism to track building energy use, costs, and savings. CCSE assisted the local government in tracking and analyzing energy data. In the San Diego region, SDG&E offers a free online tracking program (kWickview) to graph and review historic energy use. The SRP and local governments in San Diego will be provided training on the Energy Star® Portfolio Manager once the SDG&E 2009-2011 energy efficiency programs are adopted by the CPUC. Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across an entire portfolio of buildings in a secure online environment. It can help identify under-performing buildings, verify efficiency improvements, and receive Environmental Protection Agency (EPA) recognition for superior energy performance.
Developing an energy accounting and tracking software program can be a time-consuming activity, so consideration should be given to commercially available energy accounting software systems including those mentioned above. Most proprietary systems will track energy, as well as non-energy utilities such as water, wastewater, and municipal solid waste. Utilities and utility accounting software developers have responded to this problem by offering systems that enable utility billing data to be entered electronically into the energy accounting system. This simplifies the process of entering utility billing information and ensures that energy use and cost data are kept up to date.

To help a local government track and maintain energy data:

- Consider either network-based or proprietary desktop energy accounting systems. [Energy Calculators & Software](#) at USDOE.
- Ensure that the new billing and energy use data is added to the historical database as it becomes available.
- Inquire about electronic data interchange (EDI) from the utility, which allows for the transfer of billing data electronically.
- In the San Diego region, use SDG&E kWickview service to review historic energy use.

**Building and Facility Data**

Building and facility data requirements include information on age, size, occupancy, energy equipment, building envelope, past energy assessments, renovations or equipment upgrades, and any future changes planned.

**Energy Supply Information**

Compile contractual and other information relating to the local government’s purchasing arrangement for energy commodities, water, sewer, and related services.

**Local Government Policies and Government Regulations**

The appropriate local government staff member should collect any policy or regulatory information pertaining to energy-related equipment purchases, building design codes and standards, and local government planning policies. All of the historical data should be tracked and recorded in an organized and accessible format.

**Analyzing Data**

Once data is compiled and being tracked, analyze it for opportunities for energy and cost savings. Most purchased utility billing software can be set up to provide the following formats and will help determine which buildings to focus on:

- Determine for each building (or by utility meter if this is different) the year-round base loads, seasonal loads, load factor, anomalies, and billing errors.
• Determine benchmark data and energy use intensities (i.e., annual kilowatt-hours per square foot [kWh/sq ft-yr], Watts per square foot [Watt/sq ft], therms per square foot [therms/sq ft], and annual millions of British Thermal Units per square foot [MBTU/sq ft-yr]). Compare each facility against established energy use indices for similar facilities. This will give a preliminary indication of how well a building is performing.

• Review existing utility metering arrangement; assess its suitability for the local government’s energy management needs. Additional metering could be needed to provide adequate information.

Reporting Data

Determine who currently reviews energy bills and related expenses and who should receive reports on energy use and related issues and devise a plan for reporting. This involves the following:

• Determine what information requires review and when that should occur.

• Consider how providing regular information on energy use and costs can help support the energy program.

• Adapt reports to the audience. For example: the Finance department may need information regarding any sudden spikes in energy costs; building operators may require information about building efficiency compared to other similar buildings; building managers may want early warning on unexpected trends in energy use.

• Establish an organized filing system for keeping records and information relating to energy usage, energy rates and costs, technical information, equipment and facility status, energy assistance opportunities, and other key data.

IV. FACILITY ENERGY MANAGEMENT

In many local governments, building energy costs are the second largest annual expense after employee salaries. In spite of this, some local governments do not know their energy cost data. Energy costs may be distributed across departmental budgets and not accumulated even at budget time. In addition, public agencies may budget energy cost as a fixed cost and not realize that there are opportunities to reduce that expense.

Energy costs can be managed through a range of energy conservation measures and initiatives. Most local governments initially focus their efforts on improving energy efficiency in their existing facilities. There are a number of major issues to consider when developing a program to retrofit existing buildings, including:

• Assessing existing facilities

• Long-term assessment planning

• Developing projects

• Operation and maintenance
Assessing Existing Facilities

Program facilitators should start the energy plan process by reviewing the local government’s energy bills and keeping the 80/20 rule (Pareto Principle) in mind. In their experience, energy experts at CCSE have found the Pareto Principle applies to energy usage at local government buildings: it is likely that less than 20 percent of the facilities are using 80 percent of the energy.

There is more than one way to consider possible projects. One option is to pick “low hanging fruit,” e.g. a gym that contains several dozen 500-Watt incandescent lamps. This type of project can provide great savings with a short payback. With this approach however, it is rarely cost-effective to pursue projects that have longer paybacks like chiller replacements. These projects with more upfront cost face a tougher time moving forward once the more economical projects have been completed.

An alternative and more cost-effective practice is to develop comprehensive projects where short payback projects can subsidize projects with longer payback periods. Comprehensive projects like these can provide an acceptable overall project payback time and also will maximize the efficiency of all energy-using systems in the facility.

There are a number of steps in putting together a retrofit project. Apart from the acquisition of initial funding, these steps include: energy assessment, project design, construction, commissioning, project evaluation, and assembling an appropriate operations and maintenance plan for all energy systems.

Assessments can be a key piece of the initial project selection process. It is helpful to understand that there are different kinds of assessments, each equipping the Energy Manager for different kinds of decision-making. Basically, an Energy Manager makes an assessment of the energy using systems already in a building, and then makes recommendations on what can be done to improve building performance. For a complete explanation of assessments, see SRP Toolkit Step 6, “Guide to Municipal Building Energy Assessments” and Step 7, “Assessment Report Meeting.”

Long-Term Assessment Planning

The assessment of a local government’s facilities will help identify energy conservation and self-generation opportunities and enable the local government to prepare a long-term plan to complete comprehensive energy retrofits of all its facilities. However, it is not necessary to delay getting started on energy retrofit projects at some facilities while others still are being audited. As mentioned above, an examination of the local government’s energy bills will quickly reveal the big energy users. Staff can complete assessments for the remainder of the local government’s facilities as resources become available.

A typical building energy audit includes recommendations on the following features:

- Heating, ventilation, and air-conditioning (HVAC)
- Lighting
- Energy Management Systems (EMS)
• Building envelope
• Plumbing fixtures
• Self-generation opportunities
• Equipment scheduling
• Operation and maintenance improvements

The SRP Toolkit contains several Templates in Appendix B that identify relevant energy-efficiency opportunities and preliminary energy-assessment items. To prepare for energy audits or assessments, you will need to:

• Compile any previous assessments or surveys that have been performed in the past.
• Contact building managers or maintenance personnel to arrange audit and interview times.

Developing Projects

Once a building’s energy use and costs are well understood, the energy assessment is likely to reveal energy equipment upgrades that are good business decisions. The assessment recommendations may cover measures such as lighting system and HVAC upgrades, cool roof project potential, controls that save energy, or adding a renewable energy generating system. The Energy Manager can determine which measures make economic sense, are technically sound, and whether or not they will maintain or improve system performance and reliability. Having identified good retrofit measures, the following additional factors also should be considered as the project moves forward:

• Determine the availability of funding for implementing the proposed project.
• Take advantage of utility, state, and regional technical assistance programs.
• Identify the projected lifetime and proposed future uses for the building.
• Identify any other potential projects that can be combined in the contract to reduce the overall project cost.
• Non-energy considerations, such as the presence of asbestos which might affect the cost of the project.
• Determine who will be responsible for implementing the project.
• Consider the most appropriate contracting method. This might vary from a traditional design-spec-bid-construct contracting method, in which each of the required services is separately contracted out, to contracting out a whole project to an energy service company (ESCO) that will provide a complete ‘turnkey’ project.
• Identify available funding programs.
• Obtain the support of top management and include all departments affected by the project, including administration, finance, contracts, public works, engineering, maintenance, and planning.

The Federal Energy Management Program (FEMP) provides extensive information resources on developing energy projects, including downloadable software for identifying energy improvements, simulating energy use in buildings, identifying opportunities for renewable energy use, life cycle costing, and many others.

No-Cost and Low-Cost Modifications

In many cases, the assessment will identify no-cost or low-cost modifications to equipment or to its operation that can have immediate beneficial impact. These include instructions on office equipment shutdowns, thermostat settings, lighting use recommendations, better switching or other controls, motion sensors, and behavioral modifications that will not impact office productivity.

Operations and Maintenance

Improved operation and maintenance of the energy equipment in a building can provide energy saving opportunities, often at low cost to the local government. It is not unusual for the operation and maintenance savings from a retrofit project to exceed the energy savings. Successful projects require that the Team Leader work closely with maintenance staff; this also may have the additional benefit of recruiting additional advocates for sound energy management practices.

Commission or Re-commission Facilities

Commissioning a newly constructed building and re-commissioning an existing building are procedures to ensure that building energy systems closely match the actual energy needs. The process provides significant opportunities to improve energy use and should be done on a periodic basis in conjunction with the building maintenance staff. Also, consider the following measures:

• Adjust temperature set points and operation schedules of HVAC system
• Test and balance HVAC air distribution system
• Perform recommended maintenance on HVAC systems
• Perform appropriate lighting delamping, relamping, and/or re-design
• Proactive building operation and maintenance

After re-commissioning, there are often further energy and costs savings that can be obtained through a proactive building operation and maintenance program. The Energy Team should meet regularly with building operation and maintenance staff to explore improvements. Ideally, maintenance operations will progress from a preventive maintenance process, to a predictive maintenance process, and from there to a reliability-centered maintenance program. Consider doing the following:
- Participate in Utility Demand Reduction Programs
- Educate staff on workplace energy efficiency measures
- Provide an effective employee operation and maintenance problem reporting procedure
- Ensure that lights and equipment are turned off when not needed
- Ensure HVAC and other equipment is properly maintained to minimize energy losses

V. NON-BUILDING INFRASTRUCTURE RECOMMENDATIONS

Energy management plans also should include local government infrastructure and other measures. When well managed, these can reduce energy use as well as have environmental benefits. These opportunities include examination of exterior lighting, water and wastewater, recycling programs, and land use and transportation planning.

**Exterior Lighting**

Measures to improve the energy efficiency of outdoor lighting near buildings, in parking lots, and along streets offer energy savings opportunities since these systems have significant costs for energy and operations and maintenance. Outdoor lighting also has a major impact on the appearance of a facility or of a neighborhood at night. These two issues – cost and appearance – are the key issues in outdoor lighting. In exterior lighting projects, also consider the following:

- **Traffic lights.** Use light emitting diode (LED) lights for red, green, and flashing yellow lights. Consider battery backups at critical traffic intersections.

- **Streetlights.** Energy efficient compact fluorescent and LED fixtures suitable for lower wattage street lighting applications now are available. Induction and LED street-lighting demonstrations are being tested by SDG&E and the City of San Diego.

- **Parking lot lights.** In parking lots, consider bi-level (high/low) lighting with a motion sensor system and/or energy efficient compact fluorescent fixtures.

- **Small or remote lights and remote communications and call boxes.** Consider using photovoltaics with energy storage to supply lower wattage lights and those remote from the electric grid.

**Water and Wastewater**

There is a strong relationship between water and energy use. Water-related energy uses annually account for roughly 20 percent of the state’s electricity consumption, one-third of non-power plant natural gas consumption and about 88 million gallons of diesel fuel consumption. Any measure that saves water also saves energy and potentially funding. Agencies should consider the following measures:
Sustainable Region Program Action Plan

- Review local government irrigation and landscaping systems. Over watering of planted areas is common—drought tolerant, low-water-use plants, and xeriscaping should be used where possible.

- Evaluate the opportunity to shift water-pumping operations to off-peak hours.

- Implement water conservation programs.

- Water conservation measures, such as porous parking lot design, that provide for water infiltration and lowering temperatures.

- Ensure that a leak reporting system is established and effective.

- Take advantage of state and utility programs to improve water and energy efficiency; references to these programs are available through CCSE.

- Take advantage of incentives, rebates, and technical assistance available from local water authorities and other sources.

Recycling

Recycling programs have indirect energy and cost-saving benefits for local governments. In addition, they also can be a source of revenue. To increase the success of recycling programs:

- Encourage recycling through awareness programs

- Provide clearly marked recycle material containers

- Local governments can charge variable rates for garbage collection bins to reward recycling

- Promote backyard composting programs

VI. LAND USE AND TRANSPORTATION PLANNING

California energy laws have a great effect on land use and transportation planning, since the majority of GHG emissions in California are the result of infrastructure and development decisions. Based on state and local policies, local governments should consider:

- How to build buildings and how to retrofit existing buildings

- Where to locate buildings

- The quality and types of infrastructure required to serve these buildings

- Enhanced telecommunications infrastructure that would support telecommuting (California Emerging Technology Fund)

- Develop business case across industries (police, health care, education, etc.) that demonstrate energy expense savings
• Compatibility with Regional Comprehensive Plan or Regional Blueprint Plan

The Energy and Climate Change Connection

The state’s largest contributors to greenhouse gas (GHG) emissions are on-road transportation, electricity use, and natural gas use. The way local governments plan for transportation and land use, ranging from General Plans to council policies to internal soft policies and local government energy usage, all have significant impacts on a local government’s energy use choices and related GHG emissions. Therefore, addressing GHG reductions primarily is achieved from modifying energy choices and use. There are several state laws and Executive Orders from the California Governor that have been passed or issued with respect to energy conservation and climate change issues:

• Governor’s [Executive Order S-03-05](#) – Created the Climate Action Team.


• California Senate Bill (SB) 97 (Chapter 185. Statutes of 2007) – requires the Governor’s Office of Planning and Research to develop California Environmental Quality Act (CEQA) guidance to local agencies to address the potential environmental effects of GHG emissions from proposed projects.

• California Assembly Bill 811 (Levine, Chapter 159, Statutes of 2008) – California’s Clean Energy Municipal Financing Law (AB 811) authorizes a legislative body to allow property owners to enter into contractual assessments to finance installation of energy efficiency improvements and distributed generation renewable energy sources. Property owners would pay for the upfront costs of renewable and energy efficiency projects over 20 years as a line item on their property tax bills. If the property is subsequently sold, the repayment obligation remains on the property tax bill and transfers to the new owner.

• California Senate Bill 375 (Steinberg, Chapter 728, Statutes of 2008) – SB 375 was signed into law by Governor Schwarzenegger on September 30, 2008, and requires the California Air Resources Board (CARB) to establish a Regional Targets Advisory Committee (RTAC) and to establish regional GHG remission reduction targets for agencies. The law requires the integration of regional transportation planning, regional housing needs assessment planning, and GHG planning while streamlining aspects of CEQA. The success of SB 375 with respect to the development of a Sustainable Communities Strategy (SCS) will be public engagement akin to the Department of Transportation’s Regional Blueprint Planning process.

• California Senate Bill 732 (Steinberg, Chapter 729, Statutes of 2008) – The law establishes the Strategic Growth Council and would, among other things, encourage sustainable land use planning including implementing energy efficiency planning.

It should also be noted that there are many energy-related informational sources of interest to the local government including the ICLEI – Local Governments for Sustainability, an international association of local governments as well as national and regional local government organizations that have made a commitment to sustainable development. The CARB Local Government Protocols and the State Attorney General’s Office (Energy Efficiency) are also sources of information.
General Plans, Coastal Plans and Codes and Standards

Local governments have authority over land use within their boundaries, and land use decisions affect energy use. Integrated land use and transportation plans enable residents to utilize a variety of energy-efficient transportation options. In the SRP, SANDAG uses its blueprint plan, the Regional Comprehensive Plan (RCP), and its adopted regional Smart Growth Concept Map, which was an outcome of the RCP, when assessing existing local plans. The RCP integrates regional land use and transportation planning with local land use and transportation plans to better plan for future growth in the region. To date, sixteen MPOs and 50 of 58 counties in California are participating in Regional Blueprint Planning supported by the Department of Transportation to develop Regional Blueprints such as the SANDAG RCP. The goal of Regional Blueprint Planning is to better integrate land use and transportation planning in an open and broadly engaging process that preserves local land use authority while improving mobility, housing, air quality, farm and open space land preservation, resource use efficiency, and community quality of life.

The choices made by regions and local governments have energy consequences. For example, smart growth development that is by definition mixed-use and near mass transit nodes is inherently more energy efficient by providing opportunities to conveniently walk, bike, or use mass transit. Consider the following smart growth practices to reduce transportation GHG emissions and energy consumption:

- Promote transit-oriented design (TOD) by increasing housing and job density near transit nodes.
- Promote mixed use development.
- Increase connectivity of new developments, i.e., reduce the number of cul-de-sacs and increase the number of through streets.
- Integrate safe bikeways and pedestrian paths into the transportation mix and provide bicycle parking and other facilities to encourage bicycling.

The SANDAG RCP identifies various smart growth measures and densities for urban centers and university centers to main streets of smaller towns. Begun in 2008 as a pilot, SANDAG is working with the City of Imperial Beach and SDG&E to assess its General Plan and Coastal Plan to identify ways to integrate energy efficiency and GHG reduction measures into various plan elements. As of March 2009, SANDAG and SDG&E have begun efforts with the Cities of Santee and Encinitas in San Diego County to identify measures that integrate energy and climate change considerations into general plans. Additionally, in March 2008, the City of San Diego adopted a General Plan Update that included significant measures to address climate change and energy efficiency in its conservation element and other elements. Based on lessons learned over 2009, SANDAG will update the SRP Action Plan and SRP Toolkit to incorporate final results of land use planning efforts with the above-mentioned cities.

In January 2009, the Governor’s Office of Planning and Research (OPR) issued “Preliminary Draft CEQA Guideline Amendments for Greenhouse Gas” per SB 97. The OPR is in the process of conducting public workshops on the draft document and is expected to send the final document to the Resources Agency for certification and approval before January 1, 2010. The final document, a
technical advisory, will assist professional planners, land use officials, and CEQA practitioners with informal guidance to public agencies as they address the issue of climate change in their CEQA documents.

The Local Government Commission (LGC) has prepared guidelines on general plan measures to reduce community energy use. Local governments should consider the following energy-related elements of land-use planning and design that create cooler, more energy efficient neighborhoods, and reduce household energy consumption:

- Reduce the “heat island effect” through such measures as reducing street widths, limiting paved areas, and using light colored roofing and paving materials.
- Plant trees to shade houses.
- Orient streets and buildings for renewable energy systems and passive solar heating.
- Designate areas for higher density attached housing, which reduces the area of the building envelope that is exposed to the exterior climate.
- Siting, design, and construction of school facilities by the Division of the State Architect.

**Transportation Initiatives**

Local jurisdictions are positioned to be leaders in adopting new technologies. The USDOE Alternative Fuels Data Center provides useful information. In the area of transportation initiatives, the following measures should be considered:

- Purchase alternatively powered vehicles, such as electric, hybrid electric, neighborhood electric vehicles and natural gas vehicles
- Install alternative fuel vehicle refueling stations
- Consider making vehicles available for car and van pooling
- Consolidate trips involving local government vehicles
- Provide incentives for riding public transportation
- Encourage telecommuting and teleconferencing
- **“Safe Routes to Schools” Program**

SANDAG has a regional alternative fuels assessment underway that plainly identifies alternative fuel options for municipal vehicle classes, identifies funding and procurement options, and includes model ordinances. SANDAG will update the SRP Action Plan and SRP Toolkit to incorporate assessment results.
VII. DEVELOPING ENERGY SAVING POLICIES

The policies and practices adopted by a local government can have a major influence on its energy use. In many instances, these policy measures can be implemented at little or no cost to the local government and can have an immediate and a sustained impact on energy use. The recommended policies and management actions described below are grouped into three categories:

- Energy program funding
- Promoting energy efficiency and/or reducing GHGs
- Adopting policies that impact energy supply

**Energy Program Funding**

Identifying and maintaining reliable funding is essential to long-term Program success. Local governments have responded to this need for consistent funding in a variety of ways. Some energy programs depend heavily on outside support from state agencies or local utilities. Others rely on the local government’s own annual budgeting process. This can make the programs vulnerable to changes in perception of the importance of saving energy. Step 8 in the SRP Toolkit details various ratepayer and local government funding mechanisms to implement conservation projects, such as:

- Public goods charge funds are regulated by the California Public Utilities Commission (CPUC). The charge is a line item on ratepayer electric and gas bills that goes to funding energy efficiency programs (among others) at each utility across the state.

- Utility on-bill financing can cover the up-front capital costs of energy efficiency improvements by financing the improvements on a customer’s utility bill over a certain number of years at low or 0-percent financing.

- Revolving funds are internal pools of money designed to recycle a portion of energy cost savings from energy-efficiency improvements into capital for new projects. A local government can reinvest a certain percent of documented annual energy savings into a revolving fund that would provide capital for future energy efficiency projects.

- One percent for energy imposes a fee of 1 percent on all local government energy bills to finance an energy management program for that local government’s facilities.

- State energy loans programs, like the CEC Energy Efficiency Financing Program, provide financing for schools, hospitals and local governments through low-interest loans for feasibility studies and the installation of energy-saving measures.

**Promoting Energy Efficiency and/or Reducing Greenhouse Gases**

A local government’s general business practices and policies can have a powerful influence on energy use. It is important to identify potential practices that may have an impact on energy consumption and costs, or that present barriers to increased energy efficiency. If local government business practices or policies do not address reducing GHGs, the local government should work to incorporate saving energy and reducing GHG emissions into policies and business operations.
It also should be noted that there are several organizations that can assist local governments in their GHG quantification including ICLEI and the CARB Local Government Protocols. When the CPUC approves the statewide energy efficiency programs for the years 2009 through 2011, a program with ICLEI, LGC, and the Institute for Local Government (ILG) will be run in each Investor-Owned Utility service territory (SDG&E, PG&E, SCE, and SoCalGas) to provide help to local governments with addressing climate change.

**Purchasing**

The best-known program for promoting energy efficient purchases is Energy Star®, originally developed as a joint government/industry marketing and labeling program. All Energy Star® labeled products are in a Web-based list that is easily accessible. Local governments can choose to enact a policy that when purchasing any energy using equipment, the selection shall be made from the list of Energy Star® products. The challenges in this sector now rest more on ensuring that the energy management features of Energy Star® equipment are properly enabled and fully operational. As part of the technical support for the Energy Star® program, the Energy Star® Web site is a powerful implementation tool, with downloadable software.

**Short-Term Versus Long-Term Planning**

When purchasing equipment that is not part of the Energy Star® program, decisions should be made based on the total cost to purchase, operate, and maintain the equipment, rather than only the up-front capital cost. This type of life-cycle cost analysis assesses the relative costs of competing equipment choices over their anticipated lifetimes. Local governments should encourage or mandate the use of life cycle cost analysis to select high initial cost and/or high energy-using equipment, and continue to search for other ways to encourage long-term thinking for all investment decisions.

Determining total equipment costs can be more difficult when first implementing life cycle cost assessments if the equipment purchased is funded out of a capital improvement budget, while the operation and maintenance costs are funded out of an annual departmental operating budget. The local government will need to recognize the budget impacts from both areas.

The fiscal climate to today clearly dictates that traditional financing mechanisms and asset management approaches to energy and GHG reductions will need to rely on mix of solutions and partnerships. Organizations like California Forward, the Legislative Analyst’s Office (LAO), and the Center for a New Orange County can provide information and actions that can help local government move beyond conventional solutions.

**New Construction**

Many local governments are owner-occupiers of their buildings. As such, they have both the opportunity to influence a building’s performance during the design and construction phase and the incentive to minimize its long-term operating costs. There are a number of steps that can be taken to ensure a new facility is built to the highest standards of performance. For example, when selecting an architect and engineering team, the team should ensure that they have previous experience with the design of energy efficient buildings and make sure that the designers understand that operating efficiency is a priority for the new facility. Staff then should ensure that
it remains a high priority as the design work moves forward, and that this is reflected in the construction specifications. At the end of the design phase, the team should make sure that operating efficiency is not ‘value engineered’ out of the project, if unexpected budget constraints require cost cutting.

California’s state energy code, Title 24, already requires energy efficient construction standards in new residential and non-residential buildings. Local governments should consider enacting policies to require that their new facilities be designed to exceed the state code requirements, and take advantage of incentive programs designed to encourage higher performance. It also should be noted that there are design assistance programs available from the CEC and utility companies that may or not have funds available for these purposes.

To further enhance long-term building energy performance, local governments should consider adopting a comprehensive building performance approach that considers other design and operating factors for a new facility in addition to energy. One approach is to require Leadership in Energy and Environmental Design (LEED) certification (U.S. Green Building Council) or Energy Star® certification for all new buildings or major retrofit projects. The LEED program provides third-party certification of building economic and environmental performance. The Cities of San Diego, Seattle, and Portland, for example, have adopted LEED criteria for their new buildings.

If the local government leases or rents its buildings, the energy efficiency of a potential property should be one selection criteria. In some cases, building owners may be open to negotiating energy efficiency upgrades to the facility. For more information on New Construction guidelines, see SRP Toolkit Section 8, “New Construction Considerations”.

**Policies That Impact Energy Supply**

In recent years, local jurisdictions have become increasingly concerned about issues of energy supply and reliability, especially for critical facilities. Local governments can promote policies that help ensure energy reliability to their facilities by examining issues of delivery reliability, security, price volatility, and the diversity of energy supplies.

**Distributed Generation**

A more diversified mix of energy supplies will generally increase supply reliability. Local governments should assess the potential for clean onsite generation at their facilities, particularly for critical/emergency uses. The SANDAG RES and the CEC IEPR both emphasize the important role of renewable energy in meeting local and state energy goals. Other sources for information on distributed generation (DG) benefits are found on the CCSE Web site.

California Assembly Bill 2466 (Chapter 540, Statutes of 2008) was enacted and authorizes a local government entity to receive a credit on their electric bill for power generated from a renewable energy facility that generates more energy than is needed to serve the electrical load of governmental entity owned or controlled site where the facility is located. This option also could be useful to local governments.
One other option to consider is under the authority of AB 1659 (Farr, Statutes of 1984; Local Government Commission) that authorizes the formation of a Community Energy Authority, whereby “local governments working alone or in concert with other local governments can access tax-exempt financing for energy efficiency or renewable energy projects.”

**Aggregation and Municipalization**

Local government agencies also can evaluate options for the aggregation of energy loads and its impact on rates as well as evaluate the options for forming a municipal utility. Legislation and proceedings on Community Choice Aggregation (CCA) have made it easier for cities and counties to aggregate local consumers. The LGC has significant online resources about CCA. According to the LGC, CCA enables California cities and counties – or groups of cities and counties – to supply electricity to the customers within their borders. Unlike a municipal utility, such as the Los Angeles Department of Water and Power or the Sacramento Municipal Utility District, a CCA does not own the transmission and delivery systems (i.e., the poles and wires). Instead, a CCA is responsible for providing the energy commodity (i.e., the electrons themselves) to its constituents – which may or may not entail ownership of electric-generating resources. A high-level of political commitment is necessary over the long-term.

Additionally, it should be noted that there may be Local Economic Development strategies and synergies that local governments can pursue not only to encourage green businesses to locate in a given region, but also to provide disincentives for GHG-producing industries or practices. Further review of the deliberations of the Regional Targets Advisory Committee (RTAC) under SB 375 will address economic development analysis of certain business clusters and the benefits of certain industries over others.

**Cross-Sectoral Analysis**

Local governments are tremendously diverse and may benefit from the use of existing planning efforts such as water management plans, regional blueprint plans, telecommunications plans, and homeland security plans to name a few. Furthermore, there may be opportunities to leverage funding in these areas that contribute to SRP success.

**VIII. PROVIDING EMPLOYEE EDUCATION**

Educating a workforce about how they can save energy can have a measurable impact on local government energy use at a fairly low cost to implement. The USDOE has estimated that employee energy awareness programs can reduce energy consumption by up to 10 percent. These gains can be short-lived without consistent and continuing employee education. The Team Leader should consider the following ways of providing training for personnel and recognizing their achievements:

- Employee education
- Recognition and awards
- Energy Team training
Employee Education

Staff members that have been educated in the importance of reducing energy use and equipped with the necessary resources can make a significant contribution to saving energy. Education also can play a vital role in linking together multiple energy reduction strategies into a local government-wide effort. Training in energy awareness that ties energy saving in the workplace to energy saving at home is likely to have a stronger and more lasting impact. It also will reduce community and employee energy costs. The Team Leader should consider the following when planning employee energy education:

- Determine the best way to communicate energy information to employees (e.g., newsletters, posters, meetings, e-mail, Web).
- Determine the level of information appropriate for the various audiences. Illustrate potential contributions from various groups. Give managers detailed energy use statistics, energy use trends in their departments, and information on how comparable facilities are doing.
- Conduct training for all local government employees on energy usage.
- Conduct energy training for staff involved in project permitting.

Staff resources to assist with energy education are available from USEPA, USDOE, local nonprofits, and the local utility.

Recognition and Awards

Employees can be recognized in the form of awards or ceremonies that:

- Recognize departments and individual key personnel responsible for energy savings;
- Publicize successful energy projects or measures, including cost savings and environmental benefits; and
- Sponsor contests to promote saving energy and energy awareness and reward the winners with simple prizes.

These actions can provide a further incentive for managers to encourage energy efficiency by their staff. In addition, some local governments tie departmental energy performance into the manager’s and/or individual’s annual personnel evaluation.

Team Training

A program to provide continuous learning for members of the Energy Team is important for their effectiveness and motivation. Members of the Energy Team should be encouraged to consider the following opportunities:
• Send key employees to energy seminars; workshops are often held by the region’s utility.

• Use the USDOE “Energy Savers Virtual Tour” for staff training and as an individual’s personal reminder of simple energy saving measures they can implement themselves. For copies of the CD call (877) 337-3463.

• Join and participate in energy industry trade associations, such as the Association of Energy Engineers (AEE) and American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE), and in green building associations like the U.S. Green Building Council (USGBC).

• Establish a building energy monitor program where one person who works in the building is responsible for monitoring energy practices and is responsible for correcting wasteful practices. These monitors should receive basic levels of energy management training.

• Obtain professional certification for energy management leaders such as the AEE’s Certified Energy Manager designation or the LEED Accredited Professional designation.

IX. ADDITIONAL RESOURCES

Various cities’ Climate Action Plans are located at the Cool Cities Web site. The Institute for Local Government (ILG) has instituted a program that provides information about the latest climate action resources, case studies, and best practices.

The nonprofit group Natural Capitalism Solutions (NCS) has developed an online Climate Protection Manual for Cities. NCS states that its mission is “to educate senior decision-makers in business, government, and civil society about the principles of sustainability.”

In cooperation with USEPA, LGC has produced a booklet discussing the benefits of density and providing case studies of well-designed, higher density projects throughout the nation. Creating Great Neighborhoods: Density in Your Community (2003).

The Pew Center on Global Climate Change was established in 1998 as a nonprofit, non-partisan, and independent organization. The Pew Center has published a series of reports called Climate Change 101. These reports cover climate science and impacts, technological solutions, business solutions, international action, recent action in the U.S. states, and action taken by local governments.

In 2007, USEPA issued the report, Measuring the Air Quality and Transportation Impacts of Infill Development, which summarized three regional infill development scenarios in Denver, Boston, and Charlotte. The analysis shows how standard transportation forecasting models currently used by MPOs can be modified to capture at least some of the transportation and air quality benefits of brownfield and infill development. More compact and transit oriented development was projected to substantially reduce vehicle miles traveled. As the agency found, “the results of this analysis suggest that strong support for infill development can be one of the most effective transportation and emission-reduction investments a region can pursue.”
In 2007, The Urban Land Institute (ULI) produced a report entitled, “Growing Cooler: The Evidence on Urban Development and Climate Change,” which reviews existing research on the relationship between urban development, travel, and GHG emitted by motor vehicles. It further discusses the emissions reductions that can be expected from compact development and how to make compact development happen.

The California Department of Housing and Community Development has many useful resources related to housing policy and housing elements and specific recommendations for creating higher density and affordable communities.

In May 2008, the California Transportation Commission (CTC) adopted an Addendum to the 2007 Regional Transportation Plan Guidelines: Addressing Climate Change and GHG Emissions.

The California Energy Commission’s Public Interest Energy Research (PIER) Program supports energy research, development, and demonstration projects designed to bring environmentally safe, affordable, and reliable energy services and products to the marketplace.

The California Air Pollution Control Officers Association (CAPCOA) has a climate change Web site with documents such as a white paper entitled “CEQA and Climate Change” (January 2008).

The Department of Justice Office of Attorney General’s Global Warming Web site includes a section on CEQA and the Attorney General’s public comment letters.

The SANDAG Web site includes numerous planning documents and resources including the RCP, RES, Smart Growth Concept Map, smart growth visual simulations. Smart Growth Design Guidelines are under development as part of the Smart Growth Tool Box to assist local jurisdictions.

Additional Energy Web sites

California “Flex Your Power”
www.fypower.org/

California Department of Community Services and Development and LIHEAP
www.csd.ca.gov

Lawrence Berkeley National Laboratory – Buildings Technology Department
http://btech.lbl.gov/

Minnesota Sustainable Design Guide
www.sustainabledesignguide.umn.edu

Savings By Design
www.savingsbydesign.com
SANDAG Sustainable Region Program Toolkit

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The SANDAG Sustainable Region Program is a joint effort with San Diego Gas and Electric (SDG&E), the California Center for Sustainable Energy (CCSE), and the California Energy Commission (CEC). It provides technical assistance and staff support to local governments that either have not participated or have participated minimally in regional energy efficiency, renewable and green building programs available.

This Toolkit was developed with assistance from CCSE, SDG&E, and the CEC. It was prepared with the advice and assistance of the SANDAG Energy Working Group and the CEC State Advisory Task Force.
# TABLE OF CONTENTS

- Introduction to Sustainable Region Program Steps .............................................................. 5
- **Step 1:** Financing a Sustainable Region Program for Local Governments ........................ 5
- **Step 2:** Program Announcement from Agency to Local Government .............................. 9
- **Step 3:** Sustainable Region Program Questionnaire .......................................................... 9
- **Step 4:** Guide to Forming an Energy Team ...................................................................... 9
- **Step 5:** Kickoff Meeting ................................................................................................ 10
- **Step 6:** Guide to Municipal Building Energy Assessments .............................................. 11
- **Step 7:** Assessment Report Meeting ................................................................................ 12
- **Step 8:** Funding Conservation Projects ......................................................................... 12
  - Ratepayer Funding Sources .............................................................................................. 13
  - Local Government Funding Sources .............................................................................. 15
- **Step 9:** Recommendations Meeting ................................................................................ 16
- **Step 10:** New Construction Considerations ................................................................... 16
- **Step 11:** Policy Considerations ....................................................................................... 17
- **Step 12:** Presentation to City Council or Board ................................................................. 19
- Appendix A: Program Participation Timeline .................................................................. 20
- Appendix B: Sustainable Region Program Templates ......................................................... 20
  - I. Program Announcement from Agency to Local Government ........................................ 21
  - II. Sustainable Region Program Questionnaire ................................................................. 22
  - III. Preliminary Assessment Questions ................................................................................ 23
  - IV. Kickoff Meeting Agenda ............................................................................................. 24
  - V. Energy Efficiency Opportunity Checklist ..................................................................... 26
  - VI. Energy Conservation Opportunities Table ............................................................... 28
  - VII. Energy Conservation Opportunities Sample .......................................................... 29
  - VIII. Sustainable Region Program Assessment Report Meeting Agenda ....................... 30
  - IX. Sustainable Region Program Assessment Report Meeting Summary ........................ 31
  - X. Recommendations Meeting Agenda ............................................................................ 32
- Appendix C: Links to Other Toolkits and Guides ................................................................. 32
- Appendix D: SAMPLE Local Government Energy Assessment Report ........................... 33
**Introduction to Sustainable Region Program Steps**

Energy is a major operating cost for most local governments; it also is a cost that can be mitigated through planning and the creation of standard practices. Local governments can achieve lower energy costs without adversely affecting their staff or their ability to serve their constituents or ratepayers by following the practices outlined in the Sustainable Region Program (SRP).

SANDAG developed the SRP Action Plan and SRP Toolkit as part of its contract with the California Energy Commission (CEC). The SRP Toolkit was created as a resource to assist a public agency facilitator, like a Metropolitan Planning Organization (MPO) or Council of Governments (COG), with implementing its own SRP. It is a set of “tools” to aid in the development and execution of the SRP, with an emphasis on energy assessment tasks that lead to the installation of energy-saving measures, actual cost savings, and greenhouse gas (GHG) reductions. The SRP supports state mandates for energy planning including California’s preferred loading order. The loading order gives highest priority to energy efficiency measures, followed by renewable energy systems, and clean distributed generation (DG) (like fuel cells and combined heat and power systems) that reduce our demand on the utility grid. If a region’s resource needs or other requirements cannot be met through these measures, then new transmission or utility-scale fossil-fuel-based generation must be developed.

Twelve tasks and four appendices containing templates for completing tasks are included in this Toolkit. Presented in order of implementation, they are:

- **Step 1:** Financing a Sustainable Region Program for Local Governments
- **Step 2:** Program Announcement from Agency to Local Government
- **Step 3:** Sustainable Region Program Questionnaire
- **Step 4:** Guide to Forming an Energy Team
- **Step 5:** Kickoff Meeting
- **Step 6:** Guide to Municipal Building Energy Assessments
- **Step 7:** Assessment Report Meeting
- **Step 8:** Funding Conservation Projects
- **Step 9:** Recommendations Meeting
- **Step 10:** New Construction Considerations
- **Step 11:** Policy Considerations
- **Step 12:** Presentation to City Council or Board

**Appendix A:** Program Participation Timeline

**Appendix B:** Sustainable Region Program Templates

**Appendix C:** Links to Other Toolkits and Guides

**Appendix D:** SAMPLE Local Government Energy Assessment Report

**Step 1: Financing a Sustainable Region Program for Local Governments**

Securing initial funding for the SRP is the first step to a successful program rollout. The SRP Toolkit uses the three methods of financing that SANDAG employed from 2004–present as examples. Step 8 details how local governments can obtain funding for conservation projects and planning.
This section is not intended to identify the myriad of federal, state, and local funding programs available to local governments; other organizations have released guides for this purpose. For example, the Local Government Commission’s Energy Funding Web site (LGC) is a free online resource.

**How a Regional Government can Finance the SRP**

In its development, the SANDAG Sustainable Region Program has gone through three different funding iterations. Our experience has led us to recommend the funding mechanism used for the final SRP iteration: a local government partnership with the local utility. Each program funding method is detailed below.

**First Iteration (2005–2006):**

**Pilot City**

The SANDAG Energy Working Group (EWG) requested that a pilot energy efficiency program be developed to assess the effectiveness of a comprehensive energy management approach for local governments. The SRP Pilot pooled existing California Public Utilities Commission (CPUC)-funded program resources from the California Center for Sustainable Energy (CCSE) and San Diego Gas & Electric (SDG&E) to provide both technical and policy assistance to the SRP Pilot city. The intended result was to create a comprehensive energy management strategy, facilitate energy savings projects, and assist with optimization of current and potential city policies by creating a service to assist cities that had minimal participation in energy efficiency programs.

The SRP Pilot was able to succeed on a shoestring budget for three reasons:

1. A high level of interest and active participation from the selected city.
2. A strong desire from all parties involved to have the project succeed. In-kind support from the CCSE and SDG&E was provided to fill in any gaps in service not provided through existing CPUC-funded energy programs.
3. A program facilitator capable of leveraging resources from multiple energy saving programs to package them into one delivery mechanism for the city. The facilitator was familiar with the portfolio of energy programs and services available and had the ability to pull in the appropriate resources at the appropriate time. This required a high level of coordination behind the scenes.

Through a Memorandum of Understanding, SANDAG funded the CCSE to develop and implement the Pilot in cooperation with SDG&E. The CCSE, in consultation with SDG&E and SANDAG staff, recommended to the EWG that the City of Carlsbad participate in the SRP Pilot. The EWG selected the city during its March 2005 monthly meeting and the SRP Pilot began.

The City of Carlsbad was responsible for its own staff participation time. This consisted of time for four to six project meetings at key decision points, staff time to allow access to municipal buildings by outside technical staff, and time to prepare and present findings to City Council.

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1 CCSE was formerly called the San Diego Regional Energy Office.
SANDAG staff time (under 5% of one staff person) was covered by its energy planning program. The CCSE Pilot facilitator’s time (approximately 30% of one staff person) also was covered by SANDAG. The facilitator served as the primary point of contact; coordinated efforts with the city, multiple SDG&E program staff, and multiple CCSE program staff; and developed the comprehensive plan provided to Carlsbad and the EWG. The SANDAG energy planning budget was funded through member agency dues and an annual contract with SDG&E.

The majority of technical assistance provided by CCSE and SDG&E was covered by existing energy efficiency programs. A minimal amount of technical staff time was required for the SRP Pilot that was not covered by existing programs and it was provided by CCSE at a reduced rate to SANDAG.

Pilot Expansion: Four More Cities

In 2006, SANDAG sought funding to expand the SRP Pilot to two additional member cities. The existing energy budget remained constant so there were insufficient funds to continue without external help. SANDAG entered into a 2-year energy planning contract with the CEC that would enable the SRP Pilot to expand. Interest letters were mailed to SANDAG member agencies in September 2007 and the Cities of Poway and Solana Beach were selected to participate beginning in 2008.

With the goal of further leveraging the SANDAG and CEC commitment to an SRP expansion, SDG&E offered staff and consultant support to assist two more local governments during this phase: the Cities of Imperial Beach and Coronado.

In FY 2008, SANDAG dedicated approximately 10 percent (or $34,000) of its annual energy budget in staff and consultant (CCSE) time to the SRP, with the CEC contract providing an additional $30,000 in annual funding. The SRP Pilot progressed well during this time. In FY 2009, the SANDAG energy budget decreased to $239,000, of which the SRP remained at 10 percent of the budget (or $24,000) plus the approximately $30,000 from the CEC. The FY 2009 budget and staff constraints caused some stop-start in delivery of services to each of the participating cities. To remedy these barriers, SANDAG sought a dedicated funding source for the SRP.

At the time of the final SRP Toolkit released in April 2009, efforts are completed at the Cities of Solana Beach and Poway, 85 percent done in Imperial Beach and 25 percent done in Coronado.

Third Iteration (2009–2011)
Local Government Partnership with the Investor-Owned Utility

In 2008, SANDAG applied to SDG&E for a Local Government Partnership (LGP) contract to formalize the SRP. The LGPs are part of the public goods charge (PGC) funded programs regulated by the CPUC.

- The “PGC” is line item on ratepayer electric and gas bills.
- Part of the ratepayer-funded PGC goes to energy efficiency programs through each utility.
- Each utility develops an “energy efficiency program portfolio” that the CPUC approves.
Eighty percent of funds are for utility in-house programs and partnership programs. Twenty percent is awarded to third parties to administer energy-saving programs.

- The portfolio of energy efficiency programs are to span January 1, 2009, through December 31, 2011.

SDG&E accepted the SANDAG LGP and has included it in their portfolio of energy programs filed with the CPUC for 2009–2011. The proposed program is expanded in scope, outreach, and budget. The proposed budget is $1.7 million over three years and will cover several expenses not included in the SRP Pilots. The budget will cover at least two SANDAG staff at 50 percent time, relevant SANDAG staff at lesser levels, and all engineering and technical services previously funded through other energy efficiency programs. The engineering component is expected to be one of if not the highest budget cost. The program will provide services to all SANDAG member agencies. Please note that the CPUC must still approve all energy program portfolios in the state and that process is significantly late. As of the writing of this report, the utilities re-filed their portfolios to the CPUC in March 2009 with the expectation that the CPUC will make its decision before 2010.

Reasons to Apply for Local Government Partnership Funding

Although the aforementioned near-term delays cause some program delivery issues, SANDAG believes that the long-term benefits of an LGP will outweigh any initial difficulties. One of the weaknesses identified in the SRP Pilots has been a sliding timeline for participation and products. This is in part due to the flexibility needed to work across departments at the local government. It also is due to the lack of continuous resources (whether staff or financial) to maintain momentum at each city and participate in available energy efficiency programs. Since technical assistance on new construction and auditing existing buildings has been derived from existing PGC-funded programs, delays can occur. Sometimes there is a wait list for energy programs and services in high demand and the SRP Pilot participants must wait their turn. This then can create delays for subsequent steps in the timeline. Also, staff facilitation time has had to compete with other important projects, so the LGP funding will enable us to maintain dedicated facilitation time to keep the program on schedule.

Sustainable Region Program Need Established Through Pilots

Through lessons learned from the SRP Pilot efforts in 2005–2008, the need for a program that enables local governments that have little or no energy expertise to participate in energy efficiency programs has been reinforced.

To some extent, a few cities in the San Diego region have access to LGP resources (e.g. City of San Diego, City of Chula Vista, and County of San Diego). The SANDAG Partnership will provide a comprehensive and standardized approach to bringing energy saving measures and plans to its member agencies. This will ensure an equitable approach to the opportunities that can be presented to local governments, as well as a deeper set of opportunities from which to create reliable energy savings. There is no such support for the jurisdictions at this current time. The funding of this partnership will enable the partners to deliver significant energy savings that would not otherwise be captured. The partnership will provide training for these municipalities with an objective that some will be able to undertake their own programs in the future.
Step 2: Program Announcement from Agency to Local Government

The initial step in the process is to choose an interested and eligible local government to participate in the SRP. To gauge interest in completing the tasks of the SRP, the agency should send a letter to interested local governments that clearly describes the goals, benefits, and staffing obligations of the SRP. (For a sample announcement, see Appendix B: I. “Program Announcement from Agency to Local Government”)

Step 3: Sustainable Region Program Questionnaire

Because the SRP is designed to assist local governments that have not completed significant energy management activities, the selected local government should have:

- No full-time Energy Manager
- Minimal current participation in energy efficiency programs
- Available funds or willingness to finance energy projects
- Staff capacity to manage projects

The questionnaire is designed to elicit information from interested local governments so that the agency can assess candidates’ viability for participation in the SRP. (For a sample application questionnaire, see Appendix B, II. “Sustainable Region Program Questionnaire” and III. “Preliminary Assessment Questions”)

Step 4: Guide to Forming an Energy Team

When a local government has been selected to participate in the SRP, the next step is to form a local government energy team (Energy Team). This Energy Team should be comprised of the local government’s staff members whose future SRP tasks are described here.

Energy Team Leader (Initial and Main Contact)

- Works with their local government’s staff to compile and disseminate instructions, correspondence, data, etc. among all departments.
- Acts as liaison with the agency, contractors, and local government.
- Schedules first energy assessment with local government staff subsequent to identification of buildings with highest energy consumption, highest utility bill or by request. The contractors/engineers/utility staff can assist with this determination (see Facilities/Engineering section).

Management/Engineering

- Assists with identification and definition of (in writing) specific goals for local government. This can be based on internal staff assessments or other local government best practice guides. The goals should address what the local government is looking for in terms of
energy savings and/or other policy to improve local government functions. The agency or its contractor will be available to assist in this process. Goals should be based on a review of existing principles and practices in local government facilities (by technology and by staff), the priorities of top-level decision-makers, and interaction across departments.

- Once a written set of goals is established, works with the agency or its contractor to create a personalized checklist of potential problems/constraints that will help pinpoint where progress/savings/changes can be made.

**Facilities**

- Allows for straightforward and productive facility energy assessments with access to facilities. Obtains the following data:
  
  - Meter-facility identifications (ID) for each meter and facility.
  - List of city buildings including consumption data, from highest to lowest.
  - List of any construction/building projects.
  - List of current energy projects and practices.
  - Identification of contact for building access, identify building hours, staff hours.

**Finance**

- Reviews budgets for energy (electricity and natural gas)
- Identifies structures with high energy costs (potential high consumption). Reviews the rate/tariff structure(s) the city is currently subject to. This information will be reviewed by the agency or its contractor to ensure the city is on the most optimal utility rate schedule. The agency representative should start (or continue) a dialogue with the local government’s utility account executive.

**Planning**

- Identifies existing local government codes that mandate energy practices within the local government’s General Plan, Energy Plan (if applicable), and codes and charters (if applicable).
- Creates a list of current practices that promote or impede energy efficiency and conservation strategies and technologies (e.g. energy consumption, building code, procurement, other).

**Step 5: Kickoff Meeting**

After the Energy Team is formed, the agency representative should schedule an initial meeting to introduce the agency, local government, and contractor Energy Team members to each other and
inform the Energy Team of first steps in the SRP process. (For a sample kickoff meeting agenda, see Appendix B. IV. “Kickoff Meeting Agenda”)

Step 6: Guide to Municipal Building Energy Assessments

At the initial meeting, Energy Team members should designate the appropriate Facilities Team member to work with the agency’s Energy Engineer (or a contractor) on energy assessments. The Energy Engineer makes an assessment of the energy consumption at a site using currently installed systems to make recommendations for improvements to energy efficiency, conservation, GHG emission reductions and renewable potential, called Energy Conservation Opportunities (ECO).

- Several assessment types exist and each equips the Energy Team Leader for different kinds of decision-making. Objectives of energy assessments are:
  - Improved leverage of energy dollars spent
  - Maximum utility incentives
  - Short-, mid-, and long-term implementation options
  - Operating cost reduction
  - Enhanced staff/occupant comfort
  - Reduced equipment maintenance costs

Preparations for assessments include securing access to the buildings as well as compiling adequate utility data for the engineer. Two years of utility usage data is recommended to facilitate an effective assessment. To retrieve this data, the Energy Engineer can either ask the Energy Team Leader acquire data that already is available to them (where applicable), or request access to the building’s usage data. For example, in the SDG&E territory, the kWickview software system allows access to load profiles and interval data which are critical to evaluate which efficiency practices and tools will be most beneficial at the site level. (Information obtained by Appendix B. II. “Sustainable Region Program Questionnaire” should be made available to the Energy Engineer.)

At the initial stage, a “checklist” assessment is often the appropriate tool. This assessment is a snapshot of potential buildings to determine which of them to examine further. The Energy Engineer identifies potential energy efficiency measures, but does not provide project cost or savings estimates. The process can be helpful for the Energy Team’s early decision-making stages.

A more detailed level of assessment is a “preliminary assessment.” Here the Energy Engineer will include preliminary estimates of savings and the approximate costs of implementing the proposed energy efficiency measures. The information normally will be sufficiently well-developed for the building owner to decide whether to pursue a retrofit project or not.

The most detailed assessment is an “investment grade” assessment—the type of assessment you can literally “take to the bank.” It provides the most detailed and well-worked out assessment of costs and savings, and has a high level of accuracy.
To maximize the efficiency and effectiveness of any energy assessment, the Energy Engineer must possess the appropriate checklists from which to base his/her investigation. (For a sample assessment checklist, see Appendix B. V. “Energy Efficiency Opportunity Checklist.”)

**Step 7: Assessment Report Meeting**

Following the energy assessments and Energy Engineer’s compilation of the Energy Assessment Report, agency staff should arrange for a follow-up meeting. (For a sample assessment report meeting agenda, see Appendix B. VIII. “Assessment Report Meeting Agenda.”) At this stage, the agency should invite the local utility Account Executive or Energy Efficiency Programs Manager to participate. This meeting gives the agency, Energy Engineer, utility representatives, and local government an opportunity to:

- Review the report together
- Introduce utility representative into the process
- Ask clarifying questions of the engineer
- Determine next steps in the Program

(For sample Energy Assessment Report and Templates, see Appendix B. VI. “Energy Conservation Opportunities Table,” Appendix B. VII. “Energy Conservation Opportunities,” and Appendix D. “Energy Assessment Report.”)

Prior to the meeting, the agency representative should distribute copies of the completed Energy Assessment Report to all attendees via e-mail. This step enables facilitation of a comprehensive yet efficient discussion of the ECOs identified by the energy engineer.

Following this meeting, the agency representative should create and distribute a summary of the meeting. While summaries are a helpful tool for each meeting, it is critical as a follow-up to the Energy Assessment Report meeting so that the “Next Steps” discussed at the meeting are on paper and clear to all participants. (For a sample meeting summary, see Appendix B. IX. “Assessment Report Meeting Summary.”)

**Step 8: Funding Conservation Projects**

Identifying and maintaining reliable funding is essential to long-term SRP success. Local governments have responded to this need for consistent funding in a variety of ways. Some energy programs depend heavily on outside support from state agencies or local utilities. Others rely on the local government’s own annual budgeting process. This can make the programs vulnerable to changes in perception of the importance of saving energy. Two mechanisms for funding projects include:

- Ratepayer funding sources
- Local government funding sources
Ratepayer Funding Sources

Public Goods Charge Funds: Local Government Partnerships

The PGC funds are regulated by the California Public Utilities Commission. The PGC is a line item on ratepayer electric and gas bills that goes to funding energy efficiency and other programs through each utility across the state. There are several types of energy efficiency programs, including utility-run programs, third-party programs, and LGPs. Local and regional governments can apply for energy efficiency funds through an LGP with their utility.

In coordination with the SANDAG SRP, SDG&E has proposed a supplemental funding opportunity for participating local governments. Once an SRP plan is approved by a City Council or Board of Directors, the local government will be able to apply for mid-cycle partnership funds from the IOU to initiate their program. For example, under the umbrella of LGPs, SDG&E has proposed to make available seed funding to municipalities that successfully complete the SANDAG SRP. This funding would enable a local government to undertake one or more energy projects that were identified through the SRP. The goal is to build the institutional knowledge at each local government and achieve energy savings. A similar partnership effort could be proposed with utilities across the state.

State Energy Program Loans

Some local governments also have benefited from state energy loans, usually provided at relatively favorable terms. The funds normally are used to support retrofit projects in departmental facilities. The CEC Energy Efficiency Financing Program provides financing for schools, hospitals, and local governments through low-interest loans of up to three million dollars for feasibility studies and the installation of energy-saving measures. While the loan is made to the local government as a whole, internally each department using a portion of the funds may be made responsible for the debt and interest payments. The department may be required by the local government’s Financial Officer to agree to make repayments without requesting an increase in their annual budget. In return, the department retains the savings from the reduction in their monthly energy bill, plus any maintenance savings derived from operating new, more efficient equipment.

On Utility Bill Financing

On-Bill Financing programs facilitate the purchase and installation of qualified energy efficiency measures by customers (e.g. municipalities, who might otherwise not be able to act given capital constraints and administrative and time burdens to participation). On-bill financing from SDG&E offers eligible customers 0-percent financing for qualifying energy-efficient improvements. Ratepayers who participate in these programs typically are able to take part in other incentive programs as well, but at a reduced rate of incentive.

Utility and Third-Party Administrator Rebate/Incentive Programs

Through legislation passed by federal and state legislatures and implemented by California’s regulatory agencies, municipalities are able to participate in energy conservation, efficiency, renewable energy, and demand response incentive and rebate programs. Municipalities also can take advantage of utility rate structures that support green energy practices.
The following incentive programs types can be used to facilitate energy efficiency and renewable energy measures. Typically, there is a range of programs offering varying incentive levels and services depending on the customer’s needs and unique issues. Although energy efficiency programs and their administrators vary throughout the state, California has one of the most progressive mandates to promote energy efficiency in the country. Therefore, all municipalities can benefit from the programs offered through their utility.

Energy efficiency and renewable energy incentive programs typically are defined by the market sector for which they serve (e.g. residential, commercial, industrial, as well as new and existing infrastructure).

**Solar Programs**

Subsequent to the passage of Senate Bill 1 (SB 1) in 2006, the state of California has a mandate to install 3,000 megawatt (MW) of solar electricity within the state. SB 1 decrees that all energy corporations need to offer a program to incentivize their ratepayers to install solar systems that offset their electricity load. Most utilities currently use one of the following types of incentives:

- **Performance-based incentive:** The administrator provides a bill reduction based on the production of electricity from the site.
- **Capacity-based incentive:** The administrator provides a one-time credit to the customer to offset a portion of the system installation costs.

**Energy Efficient Technologies Incentive Programs**

Energy efficient technology installation programs offer incentive payments for the installation of new, high-efficiency equipment or systems for non-residential customers including municipalities. A project may consist of the retrofit of existing equipment/systems or the installation of equipment associated with new added load. Software or engineering calculations are used to estimate the energy savings and incentive depending on the type of energy efficiency measure installed. Incentives are paid based on the quantity of kilowatt-hour (kWh) or therms saved resulting from the installation of the new equipment or system.

**Nonresidential New Construction Programs**

New facilities can benefit from a program that provides technical and financial resources to aid them in the design phase of new facilities to the most cost-effective energy efficiency standards. These programs target municipalities among other ratepayers who are planning new buildings, including expansions, additions, and major remodels, as well as their selected design professionals who are providing building plans and specialty consulting regarding energy or environmental quality.

**Nonresidential Educational/Incentive Programs**

By using indicators such as energy simulation modeling, life cycle cost analysis and long term operating cost reduction goals, these programs will educate, demonstrate, and encourage energy efficiency and demand reduction above and beyond Title 24 California Energy Code. These
programs are also designed to work in conjunction with other programs that provide more robust financial incentive for energy efficiency installations.

**Local Government Funding Sources**

**Revolving Funds**

Revolving funds are internal pools of money designed to recycle a portion of energy cost savings from energy-efficiency improvements into capital for new projects. A local government can reinvest a certain percent (or all) of documented annual energy savings into a revolving fund that would provide capital for future energy efficiency projects or to fund the salary of an energy manager.

When the program is funded, fully operational and dollar savings are accumulating in the fund, the money can be left in the energy account, used to repay some of the accumulated money back to the general fund, or shared with other departments within the local government. Funding for the SRP still must go through the local government’s annual appropriation process, so program staff must continue to make sure that information on program successes is transmitted to the proper individual for the budget.

**One-Percent for Energy**

Some local governments have adopted a unique method of financing staff and individual energy projects, sometimes referred to as “One-percent for energy.” The local government imposes a percentage surcharge on departmental energy bills. The money goes into a central fund to support an energy manager, or to support energy efficiency projects.

**On Tax Bill Financing (Assembly Bill 811)**

*California’s Clean Energy Municipal Financing Law* (Assembly Bill [AB] 811) authorizes a legislative body to allow property owners to enter into contractual assessments to finance installation of energy efficiency improvements and distributed generation renewable energy sources at residential, commercial, industrial, or other real property. The capital required to pay for work may include funds available from any source, including the sale of bonds.

In March 2009, the CityFIRST program was announced by the California Statewide Communities Development Authority (California Communities). California Communities is a joint powers authority created by the California League of Cities and the California Association of Counties, and CityFIRST is their statewide AB 811 clean energy financing program. California Communities has partnered with Renewable Funding, Royal Bank of Canada, CCSE, and Ecomotion to offer this program to municipalities.

CityFIRST is a voluntary program that allows property owners to pay for the upfront costs of renewable and energy efficiency projects over 20 years as a line item on their property tax bills. If the property is subsequently sold, the repayment obligation remains on the property tax bill and transfers to the new owner.

The on-property-tax-bill funding mechanism is designed to overcome a significant barrier to pursuing major energy efficiency upgrades and clean renewable generation: high up-front costs or
initial project capital outlay versus the lifecycle cost/benefit. Municipal programs are currently being pursued by the Cities of Berkeley and Palm Desert.

**Power Purchase Agreements**

As well as receiving incentives for the installation of solar, new and creative ownership structures are paving the way for increased penetration of solar with municipalities and other solar customers. The power purchase agreement option allows municipalities to install solar panels owned by a third party at their facilities. The third party then charges the municipality for the electricity used at a rate lower than would be charge to receive electricity from the utility. Using this funding option, municipalities avoid the up-front cost of the solar installation and reap the benefits of the installation which include zero emission electricity and lower electricity bills.

**Step 9: Recommendations Meeting**

At the recommendations meeting, the Energy Team Leader should facilitate a review of the local government’s preferred action items and needs of the local government. (For an agenda, see Appendix B. X. “Recommendations Meeting Agenda.”) These recommendations should be discussed with the attending utility representative to determine incentive programs and utility assistance available for implementation of the items.

**Step 10: New Construction Considerations**

Many local governments own and occupy their buildings. As such, they have both the opportunity to influence a building’s performance during the design and construction phase, and the incentive to minimize its long-term operating costs. There are a number of steps that can be taken to ensure a new facility is built to the highest standards of performance. For example, when selecting the architect and engineering team, the Energy Team should ensure that the candidates have previous experience with the design of energy efficient buildings. In addition, the designers should guarantee the use of technologies and practices that will create the most efficient operating facility possible. At the end of the design phase, the Energy Team must verify that operating efficiency is not ‘value engineered’ out of the project if unexpected budget constraints require cost cutting. In other words, the agency and local government should make every effort to emphasize the increased value of energy efficient technologies in the design and installation phases.

**Title 24**, California’s state energy code, requires energy efficient construction standards in new buildings. Local governments should consider enacting policies to require that their new facilities be designed to exceed the state code requirements and take advantage of incentive programs designed to encourage higher performance. Title 24 focuses on the energy performance of a building. To further enhance long-term building energy performance, agencies should consider adopting a whole building performance approach that considers other design and operating factors for a new facility in addition to energy. One approach is to require LEED certification (Leadership in Energy and Environmental Design, administered by the U.S. Green Building Council), which mandates third-party certification of building economic and environmental performance. Another standard specifically related to efficiency is the Energy Star® certification process. Other programs like Build It Green also emphasize energy efficiency measures in buildings.
The Cities of San Diego, Seattle, and Portland, for example, have adopted LEED criteria for their new buildings. If a local government leases or rents its buildings, involved Energy Team members must be sure to name energy efficiency as one of the selection criteria when reviewing potential properties and find sellers (and owners) open to negotiating energy efficiency upgrades to the facility.

A discussion of new construction should be included within each meeting and be facilitated by the Agency representative. Discussion points are:

- New building plans, including timeline, budgets
- Detailed description or plan for building as currently proposed
- Contact information

**Step 11: Policy Considerations**

California energy laws have a great effect on land use planning, since the majority of GHG emissions in California are the result of infrastructure and development decisions. Based on state and local policies, local governments should consider:

- How to build buildings and how to retrofit existing buildings
- Where to locate buildings
- The quality and types of infrastructure required to serve these buildings
- Compatibility with the Regional Comprehensive Plan or Blueprint plan that considers the interrelationship of jobs, housing, population, and transportation choices

**The Energy and Climate Change Connection**

The state’s largest contributors to GHG emissions are on-road transportation, electricity use, and natural gas use. The way local governments plan for transportation and land use, ranging from General Plans to council policies to internal soft policies and local government energy usage, all have significant impacts on a local government’s energy use choices and related GHG emissions. Therefore, addressing GHG reductions primarily is achieved from modifying energy choices and use.

**Assembly Bill 32**, “The Global Warming Solutions Act of 2006,” is a California law that commits the state to GHG emissions to 1990 levels by 2020. **Senate Bill 375** was signed into law by Governor Schwarzenegger on September 30, 2008, and requires the California Air Resources Board (CARB) to establish regional GHG reduction targets for Agencies. SB 375 calls for the integration of regional transportation planning, regional housing needs assessment planning, and GHG planning while streamlining aspects of California Environmental Quality Act (CEQA). **Assembly Bill 811**, related to on Tax Bill Financing of Energy Efficiency and Renewable Energy Projects, was signed by the Governor in July 2008. It will authorize California cities and counties to designate areas within which city officials and willing property owners may enter into contractual assessments to finance the installation of distributed generation renewable energy sources and energy efficiency improvements.
Climate Change and Local Governments

Most California local governments have been charged with combating the existence and creation of GHGs and climate change with the passage of AB 32 and successive state policies and legislation. The California Attorney General has assumed a role in assisting local government entities with implementing these state legislative actions through local general plans and building codes and standards for increased energy efficiency. The Attorney General’s office holds that local governments have a requirement under the CEQA to provide policies, actions, and mitigation measures that combat GHG and climate change. For example, in a letter dated June 11 to the City of San Diego the state’s position regarding a city’s responsibility towards mitigation for climate change, global warming and GHG emissions per AB 32 is stated: “The city as lead agency is required under CEQA to adopt all feasible alternatives and mitigation measures.” (Goldberg, 2007) To this end the Attorney General is assisting local government with suggested policies, educational resources, and review of draft documents as they pertain to the reduction/elimination of GHG and climate change in compliance with CEQA.

How Will AB 32 be implemented?

CARB is the lead agency for implementing AB 32. The key elements on which CARB will focus are:

- Expansion and strengthening of energy efficiency programs and building and appliance standards,
- Expansion of the Renewable Portfolio Standard to 33 percent
- The renewable energy expansion will include “placing solar arrays and solar water heaters on houses throughout California and an increase in building standards for energy efficiency

Currently, CARB is developing a toolkit of recommended measures and best practices for local governments and small businesses to reduce their GHG emissions. Some proposed measures include adoption of some of the following changes:

- Increasing Energy efficiency
- Green building
- Cool community practices
- Water conservation
- Renewable energy generation
- Climate-friendly procurement of goods and services

How Will SB 375 be implemented?

The law authorizes CARB to set regional GHG emissions reductions targets for regions of the state. It requires agencies to create Sustainable Communities Strategies (SCS) as part of the Regional Transportation Plan (RTP) process. The SCS will need to demonstrate if a region will meet its GHG emissions targets.
reduction target given current projected financial means and constraints or if an Alternative Planning Strategy (APS) that is not financially constrained will have to be developed to show what it would take for a region to meet its goals. The APS would be prepared if the region has to make different assumptions about how the region will meet its GHG emissions target. SB 375 also will link the Regional Housing Needs Assessment (RHNA) process to the SCS process. SB 375 creates CEQA exemptions and other streamlining provisions for housing projects located near transit and in areas targeted by the “SCS” when it can be demonstrated that the GHG targets can be reached.

SB 375 preserves local land use authority. There is explicit language that states that an SCS will not supersede or interfere with local land use plans. CEQA streamlining/exemptions will be available to certain development projects that promote compact development. Specifically, projects that conform to the SCS or that are designated “transit priority projects” are available for CEQA exemptions. These projects are residential projects that are located near transit and meet certain density and floor area ratio requirements.

CARB likely will base its targets and recommendations on areas that can achieve the greatest reductions for the lowest cost. CARB is required to set its regional GHG emission targets by September 30, 2010, and MPOs will be required to include their SCS or APS in the next RTP following the setting of targets.

**How Will AB 811 be implemented?**

AB 811 will address climate change through energy conservation efforts by authorizing local governments to provide up-front financing to property owners to install solar or other renewable energy-generating devices or make energy efficiency improvements to their properties. The local government would provide the up-front funds for the project, and the property owners pay an annual assessment until those funds, plus interest, are repaid. An underlying purpose is to create a means by which a project that provides both a public benefit and an incidental benefit to particular property owners can be financed without imposing the cost on property owners in other parts of the city who derive no benefit. The CityFIRST program by California Communities, Renewable Funding, Royal Bank of Canada, CCSE, and Ecomotion is a statewide AB 811 clean energy financing program for municipalities and is further detailed in Step 8: Funding Conservation Projects.

In conjunction with or independent of state and federal laws, local policy statements can influence decisions within a local government. To make the benefits of energy investments more apparent, the policy component may include a review and proposal of energy efficiency and GHG reducing measure amendments to the General Plan, city ordinances, city charter, and other local government documents to fulfill the local government’s environmental or energy strategic goals. This review should culminate in creation of energy-saving measures for existing buildings and new construction as well as policy measures that local governments can adopt based on legislative and regulatory mandates like those described below and others specific to the region.

**Step 12: Presentation to City Council or Board**

Once a local government energy plan is completed with the above components addressed, the MPO should work with the local government staff to prepare necessary staff reports and/or a presentation of findings for the City Council or Board. The leadership should be given a high level briefing of the project and asked to approve or endorse associated energy goals and/or projects.
Appendix A: Program Participation Timeline

Activities within the Program will progress at different paces as best fit local government and program needs. The initial focus should be on identification and assessment existing buildings in which energy-saving measures could be realized. Other components, New Construction and Policy Measures, should follow. The following table provides a possible timeline for local government action.

### Sustainable Region Program Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
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<td>2</td>
<td>3</td>
<td>4</td>
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<td>2</td>
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<tr>
<td>Municipalities Apply for SRP</td>
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<td>MPO/municipality Kickoff Meeting</td>
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<td>2</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>2</td>
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<tr>
<td>MPO Conducts Energy Assessments</td>
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<tr>
<td>MPO Creates Assessment Reports</td>
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<td>Assessment Report Meetings</td>
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<tr>
<td>Recommendations Meetings</td>
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Appendix B: Sustainable Region Program Templates

I. Program Announcement from Agency to Local Government
II. Sustainable Region Program Questionnaire
III. Preliminary Assessment Questions
IV. Kickoff Meeting Agenda
V. Energy Efficiency Opportunity Checklist
VI. Energy Conservation Opportunities Table
VII. Energy Conservation Opportunities Sample
VIII. Sustainable Region Program Assessment Report Meeting Agenda
IX. Sustainable Region Program Assessment Report Meeting Summary
X. Recommendations Meeting Agenda
I. Program Announcement from Agency to Local Government

DATE

Dear LOCAL GOVERNMENT REPRESENTATIVE:

SUBJECT: Invitation to Take Part in AGENCY’s Sustainable Region Program

We are writing to inform you of a unique opportunity to participate in the expansion of an energy-saving pilot program for local governments sponsored by the AGENCY. The AGENCY will provide technical and policy support to a local government to develop an energy management plan, assess energy needs, conduct assessments of city facilities, assist in developing projects, and identify appropriate rebate and financing programs. Energy efficiency and conservation projects generally pay for themselves in three to five years. The main goal of this effort is to help local governments that have not performed significant energy management to complete energy projects and reduce their operating costs.

The AGENCY hopes that the Sustainable Region Program will develop new program delivery mechanisms for local governments to take advantage of regional energy saving programs.

The AGENCY will select a city based upon the following criteria:

• No full-time energy manager
• Minimal current participation in energy efficiency programs
• Available funds or willingness to finance energy projects
• Staff capacity to manage projects

If you are interested in being considered for this innovative Program, please contact CONTACT NAME, E-MAIL, and PHONE NUMBER by DATE.

Thank you for your interest in this program.

Sincerely,
II. Sustainable Region Program Questionnaire

Thank you for your interest in participating in AGENCY’s Sustainable Region Program (SRP), which in YEAR will provide XXX local governments in AGENCY region with services and resources for significantly improving the energy performance of their facilities. The selection process consists of analysis of your responses to the following questionnaire that will provide AGENCY with better information on your local government’s involvement and interest in energy efficiency.

Please complete the questionnaire and return to AGENCY by DATE. Applicants will be notified whether they were selected for the SRP in DATE. Questions may be directed to AGENCY REPRESENTATIVE at E-MAIL ADDRESS and PHONE NUMBER. Your completed questionnaire should be submitted to her/his email address no later than close of business, DATE.

1. Please describe your government’s participation in any existing energy efficiency programs.

2. Please describe how any current energy efficiency programs or projects are staffed and financed.

3. Please describe how potential energy efficiency projects identified in the recommendations of the SRP might be staffed and financed.

4. Please briefly describe the nature of your government’s interest in and commitment to energy management.

5. Please provide the total square footage of local government facilities and data on your energy consumption. Energy data should be provided to the finest level of detail available, such as by building, by department, or cumulatively for all facilities. Provide kilowatt-hour (kWh) for annual electricity consumption and British thermal unit (BTU) for annual natural gas consumption.
III. Preliminary Assessment Questions

1. Total Number of Facilities/Buildings:
   a. Number of Electric Accounts for These Buildings:
   b. Number of Natural Gas Accounts for These Buildings:

2. Have you conducted a government-wide energy intensity study (e.g., kWh/sq ft) to determine your highest energy users? If yes, please provide AGENCY a copy.

3. Brief summary of recent energy improvement projects (last 1 year):
   a. Completed projects (attach if necessary):
   b. Pending projects (attach if necessary):

4. How many energy assessments have you conducted in the past three years? Please provide AGENCY a copy of assessment reports.

5. Do any of your facilities use an energy management system (EMS)?
   a. How many?
   b. What type of EMS do they use?

6. Who is involved in energy project planning and implementation in your government?

7. Do you have an energy management team? (Yes/No) If yes, who is on the team?

8. Do you have a comprehensive energy management plan? (Yes/No) If yes, please provide AGENCY a copy of the Plan.

9. Do you have an education program for government personnel? (Yes/No)

10. Do you have a newsletter for personnel? (Yes/No)

11. How do you track energy costs/usage?
IV. Kickoff Meeting Agenda

Sustainable Region Program Kickoff Meeting

Date and Location

1. Introduce Key Staff and Local Government Representatives

<table>
<thead>
<tr>
<th>Project Administrator (Agency)</th>
<th>Engineer (Agency or Contractor)</th>
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<td>Name</td>
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<td>E-mail</td>
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<tr>
<th>Energy Team Leader</th>
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<td>Phone</td>
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<td>E-mail</td>
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2. Introduce Representatives to Sustainable Region Mission

Program agency representative will explain the SRP Concept and Program Goals.

3. Discuss Local Government Needs

Local government representatives will have the opportunity to raise current and potential issues with local government infrastructure, policy, funding mechanisms, process, staff, etc.

4. Identify Energy Team Members for Local Government

Agency representative will discuss the local government’s decision process in choosing the following Energy Team members:

- Energy Team Leader
- Local government management office staff
- Facilities manager/specialist
- Finance department representative
- Engineering department representative
- Planning department specialist

5. Next Steps

Set dates for follow-up meetings. Local government staff should review current practices and plans to prepare for these meetings detailing the following issues:

- Energy assessments
- ECOs recommendations
- New Construction (as applicable)
Sustainable Region Program Toolkit

- New building plans, including timeline, budgets
- Detailed description or plan for building as currently proposed
- Contact information

- Policy Considerations

Local government review of existing General Plan, Energy Plan (as applicable), municipal charter and other energy policy documents.
### V. Energy Efficiency Opportunity Checklist

<table>
<thead>
<tr>
<th>Heating, Ventilation and Air Conditioning (HVAC)</th>
<th>Yes/No</th>
<th>Notes (Current Model, Year, Size)</th>
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<tr>
<td>Air Conditioning Unit Replacement</td>
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<td>Variable Speed Drive – Fan</td>
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<td>Variable Speed Drive – Pump</td>
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<td>High-Efficiency Packaged Direct-Expansion (DX) Unit</td>
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<td>High-Efficiency Packaged Heat Pump</td>
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<td>Constant Volume (CV) to Variable Air Volume (VAV) Conversion</td>
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<td>Use Evaporative Cooling</td>
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<td>Indirect Evaporative Cooling</td>
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<td>Demand-based Ventilation</td>
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<td>High Efficiency Boiler</td>
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<td>Economizer Cycle</td>
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<td>Cooling Tower Fan Pony Motor</td>
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<td>Fume Hood Airflow Reduction</td>
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<td>Attic Exhaust Fans</td>
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<td>Add/Increase Duct Insulation</td>
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<td>Low Pressure Drop Filters</td>
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<td>Reduce Overventilation</td>
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<td>Steam Trap Optimization</td>
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<td>Add Low Load Boiler</td>
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<td>Thermal Energy Storage</td>
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<td>Ceiling Fans</td>
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<td>Electronically Commutated Motor (ECM) Fan Motor Upgrade</td>
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<td>Lighting</td>
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<td>Fluorescent Lamp Retrofit</td>
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<td>Incandescent Lamp Replacement</td>
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<td><strong>Controls (cont.)</strong></td>
<td>Yes/No</td>
<td>Notes (Current Model, Year, Size)</td>
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<tr>
<td>Hydronic Temperature Reset</td>
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<td>Temperature Setback</td>
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<td>Duty Cycling – Unoccupied</td>
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<td>Boiler Outside Air (OSA) Temperature Reset</td>
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<td>Add Occupancy Sensors</td>
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<td>Daylighting</td>
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<td>Vending Machine</td>
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<td>Charging Stations</td>
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<td>Demand Limiting Controller</td>
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<td><strong>Process</strong></td>
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<td>Office Equipment Sleep Mode</td>
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<tr>
<td>Kiln/Oven Upgrade</td>
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<tr>
<td><strong>Other</strong></td>
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<td>Gas Water Heater Upgrade</td>
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<td>Cooking Appliances Conversion</td>
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<td>Add Window Film</td>
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<td>Install/Add Roof/Wall Insulation</td>
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<td>Refrigeration</td>
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<td>Light Colored Roof Surface</td>
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<td>Passive Solar Heating</td>
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<td>Window Replacement</td>
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<td>Vestibule Air Lock</td>
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<td>Compressed Air Reduction</td>
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<td>Process Vacuum Reduction</td>
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<td>Low Flow Plumbing Fixtures</td>
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<td>High Efficiency Transformers</td>
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<td>Power Factor Correction</td>
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<td>Optimize Defrost Control</td>
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<td>Increase Refrigeration Insulation</td>
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<td>Compressor Floating Head Pressure Control</td>
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<td>Pool Dehumidification Heat Recovery</td>
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<td>Pool Cover</td>
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<td>Elevator Optimization</td>
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<td>Add Skylights</td>
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## VI. Energy Conservation Opportunities Table

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<td>4b Sample Opportunity</td>
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<td>6 Sample Opportunity</td>
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<td>7 Sample Opportunity</td>
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<td>8 Sample Opportunity</td>
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<td><strong>Totals</strong></td>
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<td>9 Sample Renewable Opportunity</td>
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<tr>
<td>10 Sample Green Building Opportunity</td>
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</table>
VII. Energy Conservation Opportunities (ECO) Sample

ECO No. 1
Retrofit Outdoor Down Lights

Recommended Action

Retrofit 50-Watt outdoor Metal Halide Down lights with 15-Watt compact fluorescent lamp (CFL) down lights.

Estimated Energy Savings = 1,722 kWh/yr
Estimated Demand Savings = 0.4 kW
**Estimated Energy Cost Savings** = **$257/yr**
Estimated Implementation Cost = $154 (after rebate)
Simple Payback Period = 7 months
Return on Investment (ROI) = 166.7%

Background

There are twelve (12) 50-Watt Metal Halide Down lights illuminating the exterior of the auditorium. The existing lamp in each fixture may be a candidate for direct replacement with a 15-Watt CFL lamp.
VIII. Sustainable Region Program Assessment Report Meeting Agenda

Sustainable Region Program Assessment Report Meeting

Date
Location
Time

1. Welcome and Introductions

The Agency representative re-introduces the energy engineer, Energy Team staff, and utility staff

2. Energy Assessment Report

The energy engineer will review each Energy Conservation Opportunity listed in the Energy Assessment Report (see Appendix D, “Energy Assessment Report”). This document includes detailed tables of energy savings, cost savings, costs for implementation of strategies, and by payback period.

The utility representative will give an initial assessment of any potential money saving programs available to the local government when considering installation of ECOs projects.

3. Financing Conservation Projects

4. New Construction and Policy Considerations

The Agency representative will lead a discussion on the following items:

- Continue policy/code/regulation issues that may be addressed with Agency representatives
- Plans for new construction, if any, over the next five years, so that the Agency representative may begin study of potential for greening of those buildings

5. Next Steps

The purpose of follow-up meetings will be to:

- Prioritize ECOs action items for projects the Energy Team has identified as feasible
- Review Agency representative recommendations for new construction
- Review Agency representative recommendations for policy
IX. **Sustainable Region Program Assessment Report Meeting Summary**

**Sustainable Regions Program Assessment Report Meetings Summary**

Date

Attendees

The Agency representative met with local government staff to discuss the outcome of the building energy assessments conducted in **DATE**. Prior to this meeting, the **AGENCY** representatives conducted energy assessments of 13 facilities to identify potential energy savings from energy efficiency, demand response, and renewable energy strategies and options.

**Agency representatives**

- Project Manager
- Energy Engineer

**Local Government representatives**

- Energy Team Leader
- Facilities representative
- Finance representative
- Administrative representative

**Summary**

This meeting began with re-introductions to refresh staff on the engineer and Energy Team Leader. The Agency representative advised the attendees about the purpose of the meetings, which was to review each of the local government’s energy efficiency and renewable energy assessments with the engineers/facility staff. The energy engineer gave a description of the data contained in the introduction to the assessment report folders (provided to the local government staff by the agency representative in paper form and through e-mail prior to the meeting). This document included detailed tables of energy savings, cost savings, costs for implementation of strategies and by payback period. The energy engineer then elaborated on the intricacies of each facility’s assessment and the ECOs associated with each.

**Next steps**

After each local government energy team has had the opportunity to digest the information disseminated at these meetings, the agency representative will schedule follow-up meetings. The purpose of the follow-up meetings will be to:

- Prioritize ECOs action items for projects that each Energy Team has identified as feasible
- Discuss policy/code/regulation issues that may be addressed with agency representatives
- Plans for new construction, if any, over the next five years, so that the agency representative may begin study of potential for greening of those buildings
• Provide answers to data request posed at meetings, specifically inclusion of incremental cost estimates for some ECOs, potential for newer technologies

X. Recommendations Meeting Agenda

Sustainable Region Program Recommendations Meeting

Date

Location

Introductions and Opening Remarks

The agency representative will open the meeting to re-introduce parties to each other.

Review of ECOs

The Agency representative and/or energy engineer will briefly review the ECOs contained in workbooks previously distributed to the local government staff.

Discussion of Local Government’s Preferred ECOs

The Energy Team Leader will lead a discussion with the energy engineer and AGENCY representative to relay which ECOs best suit the local government’s needs

Short-term (within 12 months)

Mid-term (1 to 4 years)

Long-term (5-plus years)

Discussion of Any Local Government New Construction Plans

The agency representative will discuss any new construction plans and recommendations with the agency (*following the instructions in the Toolkit “New Construction” section).

Next steps

The agency representative will arrange meeting with Energy Team Leader to present final report including ECOs, new construction, and policy recommendations.

Appendix C: Links to Other Toolkits and Guides

Several local governments, agencies, and communities have developed toolkits and guides to suit their unique needs. The following is a partial list of links to toolkits that can be of benefit to an agency during development of its SRP Program. Links already provided in the SRP Action Plan and SRP Toolkit report have not been duplicated.

• City of Chula Vista “Mission Green” Initiatives
• City of San Diego Sustainable Community Program
• County of San Diego’s Green Business Program
• Madison Wisconsin Sustainability Toolkit
• Energy Star Guidelines for Energy Management Overview
• Energy Efficiency Policy Toolkit

Appendix D: SAMPLE Local Government Energy Assessment Report

Appendix D is saved as a separate attachment due to large file size. It is the Energy Assessment Report developed and delivered to the City of Poway.
DOUBLE-TRACKING RAIL AND BUILDING TRANSIT-BASED CITY CENTERS MEETS 2030 GROWTH DEMANDS OF 314,000 DU

16 City Centers + Downtown = 10 sq. miles
Urban Core = 40 sq. miles
50 sq. miles
x 10 units/acre = 320,000 DU

(ITPR) LAND CONSUMPTION FOR 2030 PLAN PROJECTED GROWTH OF 314,000 DWELLING UNITS:

<table>
<thead>
<tr>
<th>Smart Growth Project Type</th>
<th>Dwelling Units per Acre (du/acre)</th>
<th>Square Miles Consumed</th>
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<tr>
<td>Metropolitan Center</td>
<td>75</td>
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<tr>
<td>Urban Center and Transit Corridor</td>
<td>50</td>
<td>10</td>
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<td>Town and Community Centers</td>
<td>32</td>
<td>15</td>
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<td>Rural Village</td>
<td>16</td>
<td>30</td>
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<tr>
<td>None</td>
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<td>490</td>
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<tr>
<td>None</td>
<td>2</td>
<td>245</td>
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<td>4</td>
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<tr>
<td>None</td>
<td>8</td>
<td>61</td>
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</table>

Oceanside Transit Station
½ sq. mile (320 acres)
Existing density: 7 DUPA
Planned density: 4 - 43 DUPA

Downtown
2.25 sq. miles (1,445 acres)
Mixed-use area = 330 acres
Existing density: 44 DUPA
Planned density: 72 DUPA

La Mesa
½ sq. mile (320 acres)
Existing density: 14 DUPA
Planned density: 5 - 23 DUPA
Smart Growth Incentive Program

Fund Allocation

- Two-year funding cycle
  - FY 2009 $4.77 million
  - FY 2010 $4.82 million
  - Total $9.59 million

- At least 80 percent for capital projects
- Up to 20 percent for planning projects
Funding Levels

- **Capital Grants**
  Up to $2 million

- **Planning Grants**
  Up to $400,000
Smart Growth Incentive Program

Project Selection Process

• Selection Process Directed by the RPC which includes:
  – Input from Independent Evaluation Panel
  – Review by ITOC
Smart Growth Incentive Program

Program Objectives

- Projects ready to go
- Smart growth in a variety of settings
- Reduce VMT and GHG emissions
- Support housing development
- Create great places
Smart Growth Incentive Program

Project Application Locations

Smart Growth Areas

Existing/Planned

- Metropolitan Center
- Urban Center
- Town Center
- Community Center
- Rural Village*
  (with core area)

Potential

- Mixed Use Transit Corridor
- Special Use Center

*Some areas labeled as Rural Villages are within or adjacent to an Urban Center, or within the Metropolitan Center.

Map showing Smart Growth Concept Map with various locations marked in different colors and symbols.
Smart Growth Incentive Program

Project Application Locations

Smart Growth Areas

Existing/Planned
- Metropolitan Center
- Urban Center
- Town Center
- Community Center
- Rural Village* (with core area)

Potential
- Mixed Use Transit Corridor
- Special Use Center

Capital Projects

[SANDAG Logo]
Smart Growth Incentive Program

Project Application
Locations

Smart Growth Areas

- Metropolitan Center
- Urban Center
- Town Center
- Community Center
- Rural Village*
  (with core area)
- Mixed Use Transit Corridor
- Special Use Center

Capital Projects

Recommended Projects
Smart Growth Incentive Program

Project Application Locations

Smart Growth Areas

- Existing/Planned
  - Metropolitan Center
  - Urban Center
  - Town Center
  - Community Center
- Potential
  - Rural Village*
    (with core area)
  - Mixed Use Transit Corridor
  - Special Use Center

Planning Projects
Smart Growth Incentive Program

Project Application Locations

Smart Growth Areas

- Existing/Planned
- Potential

- Metropolitan Center
- Urban Center
- Town Center
- Community Center
- Rural Village*
  (with core area)
- Mixed Use Transit Corridor
- Special Use Center

Planning Projects

Recommended Projects

SANDAG
# Smart Growth Incentive Program

## Recommended Projects by Smart Growth Place Type

<table>
<thead>
<tr>
<th>Place Type</th>
<th>Capital</th>
<th>Planning</th>
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<tr>
<td>Urban Center</td>
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<tr>
<td>Town Center</td>
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<tr>
<td>Mixed Use Transit Corridor</td>
<td>2</td>
<td>1</td>
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<tr>
<td>Special Use Center</td>
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<tr>
<td>Rural Village</td>
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</tbody>
</table>
Smart Growth Incentive Program

Funding Recommendations

- **Capital Improvement Projects**
  - $7,554,900 (79%)
- **Planning Projects**
  - $1,860,000 (19%)
Capital Project Grant Types

- Transit station area and access improvements
- Pedestrian and bicycle facilities
- Streetscape enhancements
- Public Plazas
- Traffic calming

Smart Growth Incentive Program
National City 8th Street Corridor
Smart Growth Revitalization - $2,000,000
National City 8th Street Corridor
Smart Growth Revitalization - $2,000,000
Smart Growth Incentive Program

San Diego Park Blvd/Essex St. Pedestrian Crossing and Traffic Calming - $224,000
Smart Growth Incentive Program

San Diego Park Blvd/Essex St. Pedestrian Crossing and Traffic Calming - $224,000
Planning Project Grants Types

- Station Area Plans
- Corridor Specific Plans
- Community Master Plans
- Land Use Studies
Smart Growth Incentive Program

Chollas Triangle Master Plan - $275,000
Smart Growth Incentive Program

Chollas Triangle Master Plan - $275,000
Smart Growth Incentive Program

Oceanside Blvd. Corridor Specific Plan and EIR - $160,000
Smart Growth Incentive Program

Oceanside Blvd. Corridor Specific Plan and EIR - $160,000
Next Steps

- Transportation Committee Funding Recommendation - May 15
- Board of Directors Approval - May 22
- Execute grant agreements - June/July
- Project implementation- *All projects must be completed within 3½ years*
- Program oversight
The Regional Planning Committee is asked to recommend a list of projects for funding to the Transportation Committee and Board of Directors for the first cycle of the TransNet Smart Growth Incentive Program.
EMP Land Management Grants

May 2009
Background

- SANDAG Board approved competitive process for land management grants on September 26, 2008
- $1.63 million for eligible projects:
  - Invasive species control
  - Post-fire recovery
  - Habitat restoration
  - Access control & litter removal
- Projects must start by January 30, 2010
Results

- 29 applications received – $7.1 million
- ITOC reviewed projects for eligibility
  - Two projects not eligible (research)
- Evaluation committee prioritized proposals
  - Seven members of EMPWG and two outside experts
- EMPWG discussed projects at April meeting
  - Recommend funding 9 grants (Attachment 1)
Recommendations

The RPC is asked to recommend that the Board of Directors:

(A) Approve the prioritized list of land management projects and funding allotments (Attachment 1), and

(B) Authorize staff to enter into contracts for the selected grants in the proposed allocations totaling $1.63 million dollars.
EMP Land Management Grants

May 2009
Establishing a New Regional Stakeholders Working Group

May 2009
Purpose

• Guide development of the 2050 RTP including:
  • 2050 growth forecast
  • Public participation plan
  • RTP vision, goals and objectives
  • RTP project evaluation criteria
  • Urban Core Transit Strategy
  • Sustainable Communities Strategy
Public Involvement in Planning

- Public Participation Plan (PPP) required for every step in the planning process
- Guidelines for Title VI and Environmental Justice in planning process
- Expanded effort to implement alternative methods to involve underrepresented groups in the planning process
Relationship to SANDAG Structure

Board of Directors

Regional Planning Committee (RPC)
- Tribal Transportation Working Group
- Regional Planning Technical Working Group
- Regional Planning Stakeholders Working Group

Transportation Committee
- Cities/County Transportation Advisory Committee
Recommended Membership

Up to 25 members including:

- At-large citizen representatives (16-18)
- Representatives from community-based networks identified as low income/minority (5 to 7)
Membership Selection Process

- Recruitment of interested individuals
- Competitive application process
- Membership selection criteria
- Membership Selection Committee
- Reappointment process
Next Steps

- Board of Directors approval - May 22
- Call for applications - June 1
- Conclude Selection Process - June 30
- Board of Directors approve SWG slate - July
- SWG begin meeting in July/August
- SWG would conclude with 2050 RTP adoption - (July 2011)
Recommendation

The Regional Planning Committee is asked to recommend that the Board of Directors approve the establishment of the Regional Stakeholders Working Group and its charter; issue the call for membership applications; and appoint two members to serve on the selection committee.
Establishing a New Regional Stakeholders Working Group

May 2009
Presentation Overview

- Energy and Climate Planning Program
- State and Local Energy Partnerships
- Sustainable Region Program (SRP) efforts with Member Agencies
- SRP Action Plan and Toolkit for other Regions
- Expanding the SANDAG Program
- Recommendation on Action Plan & Toolkit
1. Develop Regional Climate Action Plan (RCAP)
2. Update Regional Energy Strategy (RES)
3. Implement Sustainable Region Program (SRP)
4. Perform regional alternative fuel vehicles and infrastructure assessment for government fleet applications

- Regional Energy Working Group Oversight
- California Energy Commission Partnership
Regional – Local Energy Collaborations

• Member Agencies
• California Center for Sustainable Energy (CCSE)
• San Diego Gas and Electric (SDG&E)
• Energy Policy Initiative Center, University of San Diego (USD)
Regional - State Collaboration:

**CEC and SANDAG Energy Partnership**

“... develop and disseminate model planning and development tools and strategies ... as transferable materials for use by MPOs and COGs that wish to incorporate land use, transportation, climate change, and energy considerations into their planning efforts.”
State Advisory Task Force

- Formed by CEC to augment new issue area for them (*part of SANDAG-CEC contract*)
  - Energy - Climate change - Land use planning
- Staff Level Peer Review
  - CEC, Air Resources Board, CalEPA
  - MPOs, Caltrans
  - Local Government Commission
  - Office of Attorney General
  - Office of Senator Kehoe
“How To Guides” for the CEC

1.) SRP Action Plan

Will be interactive online guide at SANDAG website.
“How To Guides” for the CEC

2.) SRP Toolkit

Will be interactive online guide at SANDAG website.
Going Forward –

*Expanding the SRP in the San Diego Region*

- Local Government Partnership with SDG&E, start date circa Jan. 2010
- Assist additional member agencies with energy planning
- Produce “Energy Roadmap” for each
- Identify available financing for member agency to continue energy planning and programs
Recommendation

• The RPC is asked to recommend that the Board of Directors accept the Sustainable Region Program Action Plan and Toolkit
Thank You!

Susan Freedman
Senior Energy Planner

619-699-7387
sfr@sandag.org
SDG&E® expects to have its summer outlook available in mid-May, following the release of the California Independent System Operator's summer outlook at the beginning of May.
Nissan Collaboration

• New collaboration with Nissan to bring zero emission vehicles (ZEVs) to the San Diego region

• San Diego was selected as one of the 5 cities in the US to have a special roll-out to the general public of 1000 Nissan Electric Vehicles to be released in 2010 (mass marketing will occur in 2012)

• SDG&E will collaborate with SANDAG to provide the critical mass needed to assess the following:
  – Electric vehicle viability
  – Charging infrastructure needs
  – Customer needs and education

• The public-private collaborative will work to further develop and fine-tune the charging infrastructure, which is the critical link in making the vehicles commercially viable
Nissan Collaboration (continued)

Each partner’s strengths can be leveraged

A sustainable future requires all stakeholders working together

Nissan

- Electric Vehicle
- Battery
- EV Knowledge & Support

Companies

- EV fleet vehicles
- Infrastructure Support
- EV awareness

SANDAG

- Promote EV Awareness
- Infrastructure Support
- Legislation / Incentives
- Public Education
- EV Fleet Vehicles

Utilities

- Expand renewable electricity sources
- Capacity expansion
Nissan Collaboration (continued)

- SDG&E will be adding 15 to 20 of Nissan’s new ZEVs to current fleet of 200 alternative-fuel vehicles
- About the Vehicle:
  - 5-passenger
  - Compact
  - All-electric
  - Capable of achieving 100 miles on a single charge
  - Advanced lithium-ion battery
  - Four to eight hours charge time with 220-volt line
  - Also capable of charging through a standard 120-volt outlet
- Eligible for a $7,500 federal tax credit
- ALSO eligible for a $5,000 California rebate (from ARB)
Local Government Partnership with SANDAG

• SDG&E’s Local Government Partnership Program will be partnering with SANDAG to provide *Energy Roadmaps* to all local governments through 2011

• Will expand upon the current CEC Partnership and the Sustainable Region Program
Energy Roadmap – What is it?

**Energy Roadmap**: Provides a framework for local governments to identify municipal energy-saving measures and develop energy savings programs.

- Comprehensive energy assessment of municipality; addresses aspects of city operations, policy development and education opportunities.
- Provide standardized approach to energy planning and projects based on state, regional and local goals.
- Build institutional knowledge at local governments.
- Serve as conduit to additional energy efficiency program funds.
- Performance monitoring component.
Energy Roadmap – Who is Involved?

• Cross section of City staff
  – City Planners / Economic Development
  – Environmental Services
  – Financial Services
  – Public Works / General Services
  – City Council / Mayor
  – City Manager

• SANDAG and SDG&E
Energy Roadmap – Elements

• **Facilities Retrofits**
  – Implement projects identified in the Roadmap audits; leverage financing opportunities such as On-Bill Financing
  – Integrate demand response and renewable energy in City’s facilities
  – Identify actions to reduce kWh, kW and therms from City operations
  – Reduce greenhouse gas emissions

• **Land-Use Planning, Codes and Standards**
  – Incorporate energy efficiency into the City’s operational master planning efforts by providing design guidelines
  – Identify incentives for the use of energy-efficient design and equipment
  – Install energy efficient equipment in new development projects for City facilities.
Energy Roadmap – Elements (continued)

• **Education and Outreach**
  – Increase awareness of City staff, tenants and the general public about energy efficiency
  – Involve the development of a campaign to educate City staff and tenants on energy conservation and the Energy Roadmap initiatives
  – Conduct community outreach through a public education program and public awareness campaign

• **Clean Transportation**
  – Explore the option of alternative fuels for municipal fleets
  – Promote electricity as alternative fuel
  – On-road and non-road vehicles
• **Emerging Technologies**
  – Demonstrations and pilot projects
  – Example: Induction/LED street lighting

• **Partnerships/Grants/Incentives/Funding**
  – Identify funding available to City
  – Energy Efficiency Block Grants (SDG&E will provide technical resources to help cities identify projects for their grants)
Energy Efficiency Filing with CPUC

• Application for Approval of Electric and Gas Energy Efficiency Programs and Budgets for Years 2009-2011 ➔ Filed July 21, 2008

• Amended Application, Testimony, Appendices to Testimony and Workpapers ➔ Filed March 2, 2009

• Approval has been delayed, but we anticipate approval at the end of this year
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