MEETING NOTICE AND AGENDA

REGIONAL PLANNING TECHNICAL WORKING GROUP

The Regional Planning Technical Working Group may take action on any item appearing on this agenda.

Thursday, June 9, 2011
1:15 to 3:15 p.m.

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

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

AGENDA HIGHLIGHTS

- DRAFT REGIONAL HOUSING NEEDS ASSESSMENT (RHNA) UPDATE
- ENVISION 2050 — AN INTERACTIVE VIEW OF THE 2050 REGIONAL TRANSPORTATION PLAN
- TECHNICAL UPDATE OF TransNet SMART GROWTH INCENTIVE PROGRAM SCORING CRITERIA

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In compliance with the Americans with Disabilities Act (ADA), SANDAG will accommodate persons who require assistance in order to participate in SANDAG meetings. If such assistance is required, please contact SANDAG at (619) 699-1900 at least 72 hours in advance of the meeting.

To request this document or related reports in an alternative format, please call (619) 699-1900, (619) 699-1904 (TTY), or fax (619) 699-1905.
1. **WELCOME AND INTRODUCTIONS**

2. **PUBLIC COMMENTS AND COMMUNICATIONS**

   Members of the public shall have the opportunity to address the Regional Planning Technical Working Group (TWG) on any issue within the jurisdiction of SANDAG that is not on this agenda. Anyone desiring to speak shall reserve time by completing a "Request to Speak" form and giving it to the TWG coordinator prior to speaking. Public speakers should notify the TWG coordinator if they have a handout for distribution to working group members. Public speakers are limited to three minutes or less per person. TWG members also may provide information and announcements under this agenda item.

**CONSENT**

3. **MEETING SUMMARY**

   The TWG should review and approve the meeting summary from its May 12, 2011, meeting.

**CHAIR’S REPORT**

4. **2011 SAN DIEGO SECTION AMERICAN PLANNING ASSOCIATION (APA) AWARD WINNERS (Bill Chopyk)**

   Last month the SDAPA announced its 2011 award winners. The chair will highlight the winning plans, programs, and projects. Congratulations to the award winners!

**REPORTS**

5. **DRAFT REGIONAL HOUSING NEEDS ASSESSMENT (RHNA) UPDATE (Susan Baldwin)**

   Staff will update the TWG regarding the Draft RHNA Allocation and Methodology accepted for distribution by the SANDAG Board of Directors on May 27, 2011, for a 60-day public review period; the schedule for the Draft RHNA Plan; incentives as related to RHNA; and working with the CA Dept. of Housing & Community Development on housing element issues. Public workshops and hearings are currently being held throughout the region on the 2050 Regional Transportation Plan (RTP), its Sustainable Communities Strategy (SCS), the RHNA, and the RTP Environmental Impact Report.
6. ENVISION 2050 — AN INTERACTIVE VIEW OF THE 2050 REGIONAL TRANSPORTATION PLAN (RTP)
(Anne Steinberger)

SANDAG has launched Envision 2050 — an interactive, Web-based, visualization tool to educate, communicate, and visually demonstrate the priorities, investments, transportation system, and other key elements and concepts in the 2050 RTP and SCS. The tool also provides the opportunity for public comment. Staff will conduct a live demonstration of Envision 2050, which is available at envision2050sd.com.

+7. TECHNICAL UPDATE OF TransNet SMART GROWTH INCENTIVE PROGRAM SCORING CRITERIA
(Christine Eary)

The “call for projects” for the TransNet Smart Growth Incentive Program (SGIP) is anticipated to be released in January or February 2012. The attached report provides an overview of program objectives, lessons learned from the first cycle, SANDAG plans and programs developed since the last cycle that will help inform updates to the scoring criteria, and the proposed process to update the criteria.

+8. TRANSPORTATION AND LAND USE MODELING: CURRENT PRACTICE AND FUTURE TRENDS (Clint Daniels)

A presentation will be made on the current state of transportation and land use modeling at SANDAG. The presentation will include an update on next generation transportation and land use model development currently underway. The presentation was made to the SANDAG Board in March 2011.

9. ADJOURNMENT AND NEXT MEETING

The next TWG meeting will be held on July 14, 2011, from 1:15 to 3:15 p.m. This will be a joint meeting of the TWG and the Regional Housing Working Group (RHWG).

+ next to an agenda item indicates an attachment
MEETING SUMMARY OF THE MAY 12, 2011, REGIONAL PLANNING TECHNICAL WORKING GROUP MEETING

Please note: Audio file is available on the SANDAG Web site (www.sandag.org) on the TWG page.

Agenda Item 1: Welcome and Introductions (Information)

The Regional Planning Technical Working Group (TWG) meeting was called to order by Chair Bill Anderson (City of San Diego) at 1:15 p.m. Self-introductions were conducted. Chair Anderson introduced a special guest, Bruce Appleyard (University of Utah).

Agenda Item 2: Public Comments/Communications/Member Comments (Information)

Members of the public had the opportunity to address the TWG on any issue within the jurisdiction of the group that was not on the agenda. There were no public or member comments.

CONSENT ITEMS (#3 through #5)

Agenda Item 3: Meeting Summary (Approve)

The TWG reviewed the meeting summary from the April 14, 2011, joint meeting of the TWG and the Regional Housing Working Group (RHWG).

Patrick Murphy (Encinitas) was concerned that his RHNA vote was incorrect. For the record, Mr. Murphy stated he voted for options 2(c), 3(c), and 3(d) because they all have some element of planning principles; he supports all three, but is only captured for option 3(d). Chairman Anderson explained that he was only supposed to vote for one option. Mr. Murphy moved to accept the meeting summary. The motion was seconded and it was unanimously approved by the TWG.

Agenda Item 4: Draft 2050 Regional Transportation Plan: Overview, Upcoming Outreach, and Adoption Process (Information)

The SANDAG Board of Directors released the Draft 2050 Regional Transportation Plan (RTP) and its Sustainable Communities Strategy (SCS) for public review and comment on April 22, 2011. Workshops and public hearings are scheduled this June. The Draft Environmental Impact Report (DEIR) is anticipated to be released in June. The Board is anticipated to adopt the 2050 RTP/SCS this fall.
Heather Adamson (SANDAG) provided an overview of the public outreach efforts for the Draft 2050 RTP:

1) Five sub-regional public workshops and two public hearings;
2) Two additional public hearings at SANDAG meetings;
3) Notices and advertising;
4) Facebook;
5) Working with partners; and
6) Envision 2050 (a new Web-based visualization tool), which is located at [www.envision2050sd.com](http://www.envision2050sd.com).

Ms. Adamson stated that the public comment period for the Draft RTP/SCS ends on June 30, 2011. Public comments can be sent via: SANDAG Web site; Envision 2050 Web site; regular mail; e-mail; the toll free 800 number; the SANDAG fax number; or submitted at one of the public hearings. The close of the public comment period for the Draft EIR will be in mid-July 2011. Copies of the Draft 2050 RTP/SCS are available in CD format at the SANDAG Public Information Office.

**Agenda Item 5: County Water Authority Draft Urban Water Management Plan (Information)**

The San Diego County Water Authority (Water Authority) has released its Draft Urban Water Management Plan for the San Diego Region. TWG members were asked to review the document during the public review period during May 2011. A copy of the plan is located on the Water Authority Web site at [www.sdcwa.org](http://www.sdcwa.org). CDs were offered to TWG members at the meeting.

**CHAIR REPORT ITEMS (#6 and #7)**

**Agenda Item 6: Recognition of Bill Anderson, Chair of the Regional Planning Technical Working Group (Information)**

Bill Anderson, who served as the Chair of the TWG for the past three years, accepted a position in the private sector. Charles “Muggs” Stoll (SANDAG) and Carolina Gregor (SANDAG) extended SANDAG’s sincere thanks to Chair Anderson for his leadership and service and for representing the TWG’s perspectives at the Regional Planning Committee (RPC) meetings. Chair Anderson expressed his appreciation for having the privilege to work with members of both the TWG and the RPC.

**Agenda Item 7: Election of New Chair and Vice Chair (Elect)**

Bill Chopyk (Community Development Director for the City of La Mesa and the current TWG Vice Chair) was nominated by Chair Anderson to be elected as the new TWG Chair. The motion was seconded and Mr. Chopyk was unanimously elected as the new TWG Chair. Mr. Chopyk nominated Mr. Murphy (Encinitas) as the new TWG Vice Chair. The motion was seconded and Mr. Murphy was unanimously elected as the new TWG Vice Chair.
REPORT ITEMS (#8 through #11)

Agenda Item 8: Update on the Regional Housing Needs Assessment (RHNA) (Information)

SANDAG staff updated the TWG about the staff’s recommendation to the RPC on the RHNA methodology and allocation. Coleen Clementson (SANDAG) clarified that SANDAG staff recommended Option 2(b) at the RPC meeting on May 6, 2011, because this option meets all objectives of state housing element law and places the region in the best position to achieve certified housing elements for all of the local jurisdictions.

Chair Anderson stated that SANDAG staff fairly presented the RHNA options to the RPC members. After a detailed discussion of the land use and transportation issues, the RPC decided to recommend two distinct alternatives, options 2(b) and 3(d), to the SANDAG Board for discussion at the May 13, 2011, Board meeting. Susan Baldwin (SANDAG) added the Board is expected to vote on a RHNA option for a 60-day public review and comment period at its May 27, 2011, meeting.

Agenda Item 9: Technical Update of the Smart Growth Concept Map (Information)

At the April 14, 2011, meeting, SANDAG staff presented an overview of the timeline and process to conduct the technical update of the Smart Growth Concept Map in preparation for the Smart Growth Incentive Program (SGIP) call-for-projects in January or February 2012. Staff reviewed and summarized the process, which included the showcase of a new Web-based planning “prototype” tool under development that will facilitate the update.

Ms. Gregor (SANDAG) outlined the phases for the update process:

1) Update the land use inputs in the Smart Growth Opportunity Areas with the 2050 Regional Growth Forecast data (expected to be completed by September 2011);

2) Update the transportation network with the final 2050 RTP network (upon RTP adoption in October 2011); and

3) Review by policymakers (RPC, Board, etc.) to prepare for the SGIP call-for-projects in January or February 2012.

Ms. Gregor requested TWG members to appoint a technical contact person from their jurisdiction who would perform the day-to-day work with SANDAG staff on the update process. She introduced Rachael Rider (SANDAG) and Steve Hossack (SANDAG), who are developing the CommunityViz tool and the “prototype” Web-based application tool to facilitate the technical update. Mr. Hossack (SANDAG) gave TWG members a computer demonstration about the Web-based interactive tool. Staff answered questions from TWG members about the technical update process and timeframes.

Agenda Item 10: San Diego Regional Bicycle Wayfinding Signage Pilot Program Draft Approach (Discussion)

The San Diego Regional Bicycle Plan recommends that bikeways comprising the regional bicycle network be enhanced with bicycle wayfinding signage. SANDAG has received funding through the
County of San Diego Healthy Works program to develop and install signage along ten regional bicycle corridors by March 2012.

Bridget Enderle (SANDAG) updated the TWG about the wayfinding bicycle signage pilot program and outlined the process. Ms. Enderle stated that the central goals of the program are to improve navigation for bicyclists with proper signage, attract additional bicycle trips as a practical mode of transportation, and to improve safety. Staff answered questions about selection of bike routes, the regional bicycle network, funding sources, and possible sponsorships.

**Agenda Item 11: Special Workshop: Healthy Communities Atlas (Discussion)**

SANDAG’s Healthy Works project includes work to develop and enhance planning tools that will enable planners to address the public health issues that can be affected by local and regional planning decisions. One of those tools is a “healthy communities atlas” that will map key factors related to the built environment where public health and planning research has identified a link to public outcomes.

Stephen Vance (SANDAG) stated that the Healthy Works Program has six components. Mr. Vance identified one key component as the development of planning tools, such as health outcome models, including the “healthy communities atlas.”

SANDAG’s consultant, Larry Frank (Urban Design 4 Health), distributed and presented the draft map to the TWG and explained the desired results of the tool:

1. Integrate health metrics into the regional planning (land use, transportation, and health);
2. Identify trade-offs of health impacts and fiscal costs of planning decisions; and
3. Measure and track health impacts over specific time periods.

Mr. Frank explained that staff used CommunityViz technology to create the “healthy communities atlas.” He took feedback from the TWG members about their thoughts on obesity indicators, density issues, level of service for park locations, open space areas located on the map, and grant funding.

**Agenda Item 12: Adjournment and Next Meeting (Information)**

The next TWG meeting will be held on Thursday, June 9, 2011, from 1:15 to 3:15 p.m.
This report discusses the May 27, 2011, action of the SANDAG Board of Directors on the Draft Regional Housing Needs Assessment (RHNA) Methodology and Allocation; the schedule for the Draft RHNA Plan; the issue of incentives as they relate to RHNA; and working with HCD on a regional approach to addressing local housing element issues including adequate site identification. The report also notes the due date for the fifth housing element cycle (2013-2020), which is April 27, 2013.

Draft RHNA Methodology and Allocation Option 2b Accepted for Distribution and Public Comment

On May 27, 2011, the SANDAG Board of Directors accepted a Draft RHNA Methodology and Allocation for distribution and a 60-day public review period. The Board accepted RHNA Methodology and Allocation Option 2b. Comments on the Draft RHNA Methodology and Allocation should be submitted to SANDAG by Thursday, July 28, 2011.

A notice was posted on SANDAG’s Web site on May 27 regarding the Board action on the Draft RHNA 60-day public review period, and how to submit comments. SANDAG staff also sent an e-mail to Regional Planning Technical Working Group (TWG) and Regional Housing Working Group (RHWG) members on May 31, 2011, regarding the Board action, which included links to the Board report, Board vote, and meeting handouts. A letter from the San Diego Housing Federation and a table showing the number of building permits issued for new housing units during the 2005-2010 housing element cycle (and 7.5-year 2003-2010 RHNA projection period) distributed at the Board meeting are attached. The information in the table is from the Annual Housing Element Progress Reports submitted to SANDAG and HCD, or based information provided by local jurisdiction staff.

Public workshops and public hearings for the Draft RHNA, Draft 2050 Regional Transportation Plan (RTP) and its Sustainable Communities Strategy (SCS), and Draft Environmental Impact Report (DEIR) for the Draft 2050 RTP/SCS are being held in June. The location, dates, and times for these workshops/hearings can be found on SANDAG’s Web site on the RTP Web page. Comments received on the Draft RHNA Methodology and Allocation will be brought to the TWG and RHWG for their review in September.

SANDAG staff is available to make presentations regarding the Draft RHNA and Draft 2050 RTP/SCS. Please contact Karin Ross at (619) 595-5610 or kros@sandag.org if you would like to schedule a presentation.

RHNA Plan

SANDAG staff is drafting a RHNA Plan that will include the Draft RHNA Methodology and Allocation; summarize housing element law; document how the regional housing need was determined; and describe the RHNA methodology, its various components, how it meets the
objectives of state law, and the process used to develop it. The Draft RHNA Plan will be reviewed at a joint TWG/RHWG meeting on July 14, 2011.

Work with HCD on Adequate Sites Issues

During the Board meeting, members of the Board stated their interest in initiating a discussion with the California Department of Housing and Community Development (HCD) regarding a regional approach to addressing local housing element issues including identifying adequate sites in local jurisdiction housing elements. In particular, there appears to be an interest in pursuing: (1) allowing all jurisdictions in the San Diego region to count sites zoned for 20-29 dwelling units per acre to meet the site identification requirements for their lower-income housing needs; (2) allowing jurisdictions to count redevelopment and infill sites in the same manner that vacant sites can be counted; and (3) allowing existing units that are rehabilitated and rent-restricted to count to a greater degree than currently allowed by state law.

Incentives and RHNA

SANDAG has two competitive grant programs that have been subject to Board Policy No. 033, which was adopted in conjunction with the 2005-2010 housing element cycle. The two programs include the TransNet Smart Growth Incentive Program (SGIP) and the TransNet Active Transportation Grant Program (formerly the TransNet Bicycle and Pedestrian Grant Program). The next call for projects for the Active Transportation Program will be issued this summer and will be subject to Policy No. 33.

SANDAG staff is working on a technical update of the Smart Growth Concept Map (SGCM) and reviewing the scoring criteria for the next call for projects for the SGIP, which will be issued in the early part of 2012. The TWG, RHWG, and other working groups will provide input on the evaluation criteria for the next SGIP cycle (see Item #7). As part of this discussion, the working groups should discuss the potential retention, elimination, or revision of Policy No. 33. Another option to consider would be to incorporate some elements of Policy No. 33 into the SGIP criteria. The attached letter from the San Diego Housing Federation (referenced on page one of this report) also provides recommendations related to incentives and affordable housing.

Housing Element Due Dates

Housing elements for the fifth housing element cycle in the San Diego region are required to be completed with a finding of compliance by the California Department of Housing and Community Development (HCD) by April 27, 2013. The housing elements will cover the time period of January 1, 2013, through December 31, 2020 (a planning period of eight years). The RHNA numbers cover the time period of January 1, 2010, through December 31, 2020 (a projection period of eleven years).

Attachments: 1. Letter to SANDAG Board of Directors from Susan Tinsky, Executive Director, San Diego Housing Federation dated 5/23/11
              2. Very Low and Low-Income RHNA Allocations and New Units Permitted, Fourth Housing Element Cycle, 7/1/05 – 6/30/10

Key Staff Contact: Susan Baldwin, (619) 699-1943, sba@sandag.org
May 23, 2011

Honorable Jerome Stocks, Chair
Board of Directors
San Diego Association of Governments
410 B Street, 8th Floor
San Diego, CA 92101

Re: RHNA Allocation – Recommend Adoption of Option 3c and Implementation of Complementary Incentive Program

Dear Chairman Stocks:

On Friday, May 27, the SANDAG Board of Directors will make a recommendation on the Regional Housing Needs Assessment (“RHNA”). As you are aware, this cycle’s RHNA allocation is not just germane to the region’s housing needs. Pursuant to SB375, this allocation is also critical to the adoption and implementation of San Diego’s Regional Transportation Plan and Sustainable Communities Strategy.

SB375 provides the region with an opportunity to plan outside the “silos” by strengthening the connections between transportation, housing and other land uses. Recognizing that each jurisdiction’s individual decision-making has a collective and cumulative impact on the region as a whole, strengthening these connections will provide incalculable economic and social benefits to all the affected jurisdictions by:

1) Decreasing regional and intra-jurisdictional traffic by increasing jobs housing balance. This will lead to increased worker productivity and increased highway capacity for commercial goods movement.

2) Creating more compact development patterns that will result in more financially and environmentally sustainable communities. This will allow jurisdictions to maximize their investment in public infrastructure and services in a smaller geographic area, allowing their dollars to go much further. In addition, jurisdictions can experience increased tax-generated revenues from the economic development that is generated by well-planned transit-oriented development.

3) Realizing the maximum value from our regional investment in transportation infrastructure by giving commuters true alternatives to utilizing single occupancy vehicles. In doing so, freeway capacity can be increased without adding additional lanes.
In order to maximize the benefits that SB375 offers, we encourage you to reject the staff’s recommendation of Scenario 2b, in favor of Option 3c. The latter scenario: 1) is more consistent with and builds upon the goals set forth in the current Regional Comprehensive Plan, and 2) maximizes the intent of housing element law by fully applying the objectives set forth under the law.

Integral to realizing the benefits afforded to the region by the implementation of SB375 is not just planning for housing in the “right” locations, but instead ensuring that the affordable housing is built. While SANDAG does not have the authority to regulate local land use, it does have the ability to incentivize development that is consistent with the goals of SB375 and our Regional Comprehensive Plan. We recommend that all competitively awarded funds, including Smart Growth Incentive Funds and TransNet Bicycle and Pedestrian Funds, be allocated in a way that acknowledges jurisdictions’ efforts to achieve regional goals for jobs-housing balance.

SANDAG should ensure that the criteria for allocation of these funds include: 1) a requirement that all developments supported by the funds include an affordable housing component; 2) give strong priority for jurisdictions taking more than their “fair share” of affordable housing under the RHNA process; and 3) gives preference for providing funding to governmental or public-private partnerships which result in the acquisition of land for affordable housing development adjacent to major transit nodes concurrent with the acquisition of transit right of way.

Through our recent planning efforts, SANDAG and its member jurisdictions have laid a strong foundation for making the critical connections called for in SB375. We hope that you will continue this progress by adopting Option 3c today and directing the implementation of funding allocation criteria that support the implementation of the goals of SB375.

Sincerely,

Susan Riggs Tinsky
Executive Director
### Very Low and Low Income RHNA Allocations and New Units Permitted

**Fourth Housing Element Cycle 7/1/2005 - 6/30/2010**

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<th>Total Very Low + Low RHNA</th>
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<th>Low Income RHNA</th>
<th>Total Very Low + Low RHNA</th>
<th>% of RHNA for new V.L. + L Income Units</th>
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*Data does not include building permits issued between 1/1/10 and 6/30/10 (last 6 months of housing element cycle). Only permits for new units are included; building permits issued for rehabilitation of existing units are not included.

Source: Local jurisdiction Annual Housing Element Progress Reports and contact with local jurisdiction staff.

May 27, 2011
Introduction

Staff is preparing for the second round of funding for the TransNet Smart Growth Incentive Program (SGIP). Approximately $12 million will be available for the next call for projects, which is anticipated in early 2012, following completion of the Smart Growth Concept Map technical update. Staff is preparing a technical update to the SGIP scoring criteria to reflect lessons learned, policies resulting from the 2050 Regional Transportation Plan (RTP) and Sustainable Communities Strategy (SCS), the Climate Action Strategy, and to incorporate new planning tools such as Designing for Smart Growth. This report provides a review of the program objectives, lessons learned from the first funding cycle, an overview of the planning documents and tools that will guide the update, and the proposed process to update the criteria. The Regional Planning Technical Working Group (TWG) and the Cities/County Transportation Advisory Committee (CTAC) will be invited to provide feedback on the updated criteria at workshops and their regular meetings later this year.

The program was established through the TransNet Extension Ordinance “to provide funding for a broad array of transportation-related infrastructure improvements that will assist local agencies in better integrating transportation and land use, such as enhancements to streets and public places, funding of infrastructure needed to support development in smart growth opportunity areas consistent with the Regional Comprehensive Plan, and community planning efforts related to smart growth and improved land use/transportation coordination.” In May 2009, SANDAG awarded $9.4 million in funding to 14 projects (six planning grants and eight capital grants) for the first two-year cycle of the TransNet SGIP.

Discussion

FY09-FY10 Grants: Program Objectives and Lessons Learned

Before reviewing the program objectives and lessons learned from the first round of funding, a summary of the funding requests and awards will help to illustrate program demand in light of the parameters that were set for the funding. As prescribed by the Regional Planning Committee, 80 percent of the available funds were awarded to capital grants, and the remaining 20 percent were awarded to planning grants. In total, SANDAG received 17 applications for capital projects, and awarded funding to eight of those projects. Eighteen applications were received for planning
projects, and six received funding. Please see Attachment 1 for a list of applications and funded projects.

The program objectives outlined in the first TransNet SGIP call for projects awarded in 2009 form the basis for the scoring criteria. They provide guidance in measuring a project’s potential to help transform communities, and to result in exemplary smart growth places. The objectives prescribed that projects funded by the SGIP should:

- Be “ready-to-go” and serve as catalysts for further smart growth development;
- Influence land development by improving the public realm and encouraging private smart growth projects that, in combination, create great places;
- Contribute to the reduction of greenhouse gas emissions by encouraging travel by means other than private automobile. In particular, the projects should support public transit usage by being located in areas served by transit, and by improving access to transit;
- Support housing development;
- Provide model examples of smart growth in a variety of settings in the region.

Lessons learned from the first round can be considered relative to how well the criteria resulted in projects that meet the above objectives, and yielded transformational projects. The lessons learned indicate where updates to the criteria should be considered.

**Lesson Learned #1:** To create truly great places, the capital project criteria update should place greater emphasis on criteria that specifically address the quality of the proposed project, to ensure that projects will result in true smart growth placemaking in a comprehensive, rather than piecemeal, way.

Of the resulting capital projects, slightly over half focused on improvements at single intersections or short roadway segments, rather than comprehensive project areas such as transit station areas or mixed-use corridors. Of the seven funded capital projects, only three addressed broad area improvements over a station area or multiple-block corridors. Each of these received approximately $2 million in funding. The remaining four funded capital projects, which cost less than $500,000 each, focused on single intersection improvements or short segments. In this last round of funding, the combination of points dedicated to land use and transportation characteristics of the project area, Policy No. 33, and cost-effectiveness (in total, 56% of the points) gave the latter projects an advantage.

To emphasize catalytic and transformational projects, staff is considering an emphasis on points for the quality of the proposed project and a minimum funding amount for capital projects.
Lesson Learned #2: The updated criteria should be more effective in awarding projects in a variety of settings in the region.

Of the projects funded for both capital and planning grants, only one was located in North County, and one in East County. However, almost half of the projects applied for were located in North or East County (8 out of 18 planning grants and 7 out of 17 capital grants). This is particularly important in order to address emerging smart growth areas where planning for jobs-housing balance and bicycle, pedestrian, and transit access is critical to smart growth in the region.

Greater emphasis on the same criteria addressed above, specifically the quality of the proposed project, with perhaps less emphasis on the land use and transportation characteristics may help increase the likelihood that the funded projects are spread throughout the region. Capital and planning grant eligibility and scoring criteria from the first round can be found in Attachments 2 and 3.

Lesson Learned #3: Process improvements are needed in overall grant administration.

Finally, lessons have also been learned in overall administration of these grants. As discussed in the regular grants status update provided to the Regional Planning Technical Working Group (TWG) and Regional Planning Committee (RPC), timely performance has been a challenge, particularly in execution of grant agreements. SANDAG has made a number of process improvements since the first round of funding. Timely use of funds will now be addressed by Board Policy No. 35, which outlines deadlines for applications, grant agreement execution, and project completion. Additionally, staff is exploring the possibility of providing on-call consultants to grantees to facilitate project initiation, building off of the process initiated with the Healthy Works grants. And finally, in response to concerns regarding appropriate costs and grant expenditures, applicants will be required to submit detailed cost proposals that will be considered with their applications.

Planning Documents to Guide the Criteria Update

The criteria will also be updated to reflect policies and objectives outlined in planning documents and tools that have been or are in the process of being adopted by the SANDAG Board of Directors. These include the 2050 RTP and strategies contained therein, such as the Sustainable Communities Strategy, the Urban Area Transit Strategy, and the San Diego Regional Bicycle Plan. Policies that will be considered in the update of the criteria include greater emphasis in the new RTP on active transportation and social equity. Additionally, staff will consider how to incorporate the Smart Growth Scorecard and principles outlined in Designing for Smart Growth.

Criteria Update Process and Next Steps

This staff report will also be presented to the CTAC, RPC, and Transportation Committee in July. The update of the SGIP scoring criteria will occur at the same time as the technical update of the Smart Growth Concept Map. Staff will prepare a draft set of updated criteria for review by members of the TWG and the CTAC at two voluntary workshops in the fall, followed by presentations to the full TWG and CTAC membership. Other stakeholder groups such as the Regional Housing Working Group and the Bicycle-Pedestrian Working Group will be invited to the workshops as well. Staff will present the updated criteria for RPC approval in early 2012, at which time the RPC will be asked to release the call for projects.
It should also be noted that an update of Policy No. 33 may result from the updated Regional Housing Needs Assessment, which was recently accepted by the Board for a 60-day public review process. Any changes to Policy No. 33 will be addressed accordingly in the update of the SGIP criteria.

Attachments: 1. FY 2009-2010 TransNet Smart Growth Incentive Program Projects
   2. FY 2009-2010 TransNet Smart Growth Incentive Program Capital Grant Eligibility and Scoring Criteria
   3. FY 2009-2010 TransNet Smart Growth Incentive Program Planning Grant Eligibility and Scoring Criteria

Key Staff Contact: Christine Eary, (619) 699-6928, cea@sandag.org
### TransNet Smart Growth Incentive Program

#### Capital Project Priority Recommendations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project</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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<td>$5,067,000</td>
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<tr>
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<td>$224,000</td>
<td>$320,000</td>
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<tr>
<td>City of San Diego</td>
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<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>
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<td>$333,000</td>
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<td>$429,200</td>
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<table>
<thead>
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<th>Agency</th>
<th>Project</th>
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<td>$600,000</td>
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<tr>
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<td>South Santa Fe Infrastructure Improvements</td>
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#### Minimum 80% Capital Funds

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<td></td>
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Total Requested Funds (Capital and Planning) $22,614,900

Amount Oversubscribed $13,175,464
## TransNet Smart Growth Incentive Program
### Planning Project Priority Recommendations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Recommended Projects</th>
<th>Score</th>
<th>SGIP Funds Requested</th>
<th>Total Cost</th>
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<td>Chula Vista</td>
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<td>400,000</td>
<td>550,000</td>
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<td>City of San Diego</td>
<td>Euclid and Market Village Master Plan</td>
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<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

**Not Recommended for Funding**

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<tr>
<th>Agency</th>
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<tr>
<td>City of San Diego</td>
<td>Mid-Coast South Station Area Plan</td>
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<td>San Ysidro Blvd. Mobility and Village Plan</td>
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<tr>
<td>San Marcos</td>
<td>General Plan Update to Support Smart Growth Communities</td>
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<td>Downtown Photo simulations</td>
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<td>La Mesa</td>
<td>Spring Street Station Smart Growth Implementation Plan</td>
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<td>Carlsbad Barrio Land Use Study</td>
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<td>265,000</td>
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<td>County of San Diego</td>
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<td>Del Mar</td>
<td>Village Center District Specific Plan and Form Based Code</td>
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</table>

**Total**

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

**Total TransNet Funding Available**

$9,439,436

**Maximum 20% Planning Funds**

$1,887,887

**Total Recommended for Planning Projects**

$1,860,000

**Total Recommended for Capital Projects**

$7,554,900

**Remainder Available for Contingency**

$24,536
# Smart Growth Incentive Program Capital Project Evaluation Criteria Matrix

## I. LAND USE AND TRANSPORTATION CHARACTERISTICS OF THE AREA AROUND THE PROPOSED CAPITAL IMPROVEMENT PROJECT

### 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%
- For Community Centers, Rural Villages, Mixed-Use Transit Corridor
  - 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%

#### AND

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>6</td>
<td>2%</td>
</tr>
</tbody>
</table>

### 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%
- For Community Centers, Rural Villages, Mixed-Use Transit Corridors
  - 6. Exceeds minimum residential requirements by 100%
  - 4. Exceeds minimum residential requirements by 50-99%
  - 2. Exceeds minimum residential requirements by 25-49%

#### OR

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>1</td>
<td>6</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### 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%
  - 2. Exceeds minimum employment requirements by 100% or more
  - 1. Exceeds minimum employment requirements by 50-99%
  - 1. Exceeds minimum employment requirements by 25-49%
- For Community Centers, Rural Villages, Mixed-Use Transit Corridors
  - 6. Exceeds minimum residential requirements by 100%
  - 4. Exceeds minimum residential requirements by 50-99%
  - 2. Exceeds minimum residential requirements by 25-49%

#### OR

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>1</td>
<td>6</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### 3. Mix of Uses (maximum 3 points)*

- Residential + 6 other uses
- Residential + 4-5 other uses
- Residential + 2-3 other uses

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>6</td>
<td>2%</td>
</tr>
</tbody>
</table>

### 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)
- 100% of units affordable
- 10-99% of units affordable
- When 50-100% of units in the development are restricted to low to very-low income residents, add 2 points

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2</td>
<td>6</td>
<td>2%</td>
</tr>
</tbody>
</table>

### 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 train station or transit hub*
- 12. Project abuts or is on site to a Regional or Corridor service station or a Transit Center
- 10. Project is within ½ mile of a Regional or Corridor station or a Transit Center
- 8. 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)
- 6. 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)

<table>
<thead>
<tr>
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<th>Weight</th>
<th>Score</th>
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<tbody>
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<td>12</td>
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<td>12</td>
<td>4%</td>
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</tbody>
</table>

#### 2. Bicycle facilities* (up to 2 points based on quality and utility)*

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### 3. Walkability measured by intersection density (up to 4 points)*

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
<th>% of Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>1</td>
<td>4</td>
<td>1%</td>
</tr>
</tbody>
</table>

#### 4. TDM strategies existing or proposed* (2 points)

<table>
<thead>
<tr>
<th>Points Possible</th>
<th>Weight</th>
<th>Score</th>
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<tbody>
<tr>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>
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.
## Planning Project Evaluation Criteria

### 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
TRANSPORTATION AND LAND USE MODELING: CURRENT PRACTICE AND FUTURE TRENDS

Introduction

SANDAG strives to remain at the forefront of United States transportation and land use modeling. The current SANDAG transportation and land use models are consistent with the models used throughout the country, and SANDAG along with the other major California Metropolitan Planning Organizations (MPOs) is leading the development of the next generation of transportation, land use, and economic models.

SANDAG deals with many complex issues facing the San Diego region, including the development of a long-range Regional Transportation Plan (RTP). Transportation and land use models perform a very basic yet vital set of functions. Models are the principal tools used for alternatives analysis, and they provide planners and decision makers with information to help them equitably allocate scarce resources. To many people outside of the planning profession, computer models are often little understood or viewed as some kind of mystical black box. This report intends to clear up some of the mystery surrounding models and provides an overview of the current modeling tools used by SANDAG for the 2050 RTP as well as a view of the next generation models, the Activity-Based Transportation Model (ABM) and Production, Exchange, and Consumption Allocation System (PECAS) land use and econometric model.

One important point should be kept in mind throughout this report - models do not make decisions - but they aid in measuring and evaluating alternative solutions and their implications.

Discussion

Models

Models are used to simplify complex systems into a manageable scale. For example, an aerospace engineer builds a model airplane to test aerodynamics and maneuverability before building a full-size aircraft. However, unlike a physical model airplane, planning models are often expressed in ‘nonphysical’ or mathematical terms.

For instance, economists tell us that other forces being equal, the demand for a particular product (an ice cream cone, for example) is directly related to the price that the product sells for (i.e., supply and demand). Specifically, as the price of ice cream goes down, the more cones an individual will buy. Suppose that observations of a particular individual reveal that consumption of ice cream cones per week varies with price as shown below:
<table>
<thead>
<tr>
<th>Price of Cones</th>
<th>Quantity Purchased Per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3.00</td>
<td>2</td>
</tr>
<tr>
<td>$2.50</td>
<td>4</td>
</tr>
<tr>
<td>$2.00</td>
<td>6</td>
</tr>
</tbody>
</table>

With this information, a simple mathematical relationship between price and demand is apparent, and with this relationship in mind, it is possible to predict that if the cost of ice cream cones were to drop to $1.50 each, the quantity demanded would increase to eight per week.

Although this example is over-simplified, it serves to illustrate how a model can be expressed mathematically. Like the aerospace engineer’s airplane, this mathematical model is an over-simplification of the real world; however, each type of model can provide valuable information.

**Regional Modeling**

The process of developing transportation and land use models is time consuming, but these models provide a significant return on investment. Regional models provide the capability to account for the varied and complex forces that are at work within the social, economic, and physical aspects of the regional environment. The models provide valuable insights into many important questions in a short amount of time for more informed decisions. Regional models also educate planners and policymakers beyond their intuitive judgment. Regional models provide answers to questions like “If we change this policy, how might that affect the region in the years to come?” These answers can help policymakers make the important decisions that shape the region’s future.

**Transportation Modeling for the 2050 Regional Transportation Plan**

For the 2050 RTP, SANDAG uses an enhanced four-step transportation model. Four-step models have been the standard in transportation modeling since the late 1950s, and they are used by nearly every MPO in the United States for the development of transportation plans, corridor studies, Federal Transit Administration New Starts proposals, and air quality analyses. The traditional four steps of this model are:

1. Trip generation  
2. Trip distribution  
3. Mode choice  
4. Traffic (route) assignment

The four steps are described briefly in the following sections. For more complete information, please refer to the SANDAG Transportation Model Documentation online. The model is largely established from travel behavior survey data from 1995, 2001, and 2006.

---


This documentation was published in 2008 after the release of the 2007 RTP. SANDAG has made enhancements to the model including a truck model, pricing sensitivity, and non-motorized sensitivity, which will be fully documented at the completion of the 2050 RTP.
**Trip Generation**

SANDAG begins the transportation modeling process by identifying the total number of trips produced in the region. A trip is made up of two parts, an origin (production) and a destination (attraction). Trips are categorized into ten categories, which are used later in the model for matching origins and destinations as well as choosing the travel mode (mode choice).

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>Description / Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home-Based Work</td>
<td>Commute</td>
</tr>
<tr>
<td>Home-Based College</td>
<td>Student Trip to College / University</td>
</tr>
<tr>
<td>Home-Based School</td>
<td>Student Trip to School</td>
</tr>
<tr>
<td>Home-Based Shopping</td>
<td>Shopping Trip</td>
</tr>
<tr>
<td>Home-Based Other</td>
<td>Doctor’s visit, visiting friends, dining out, etc.</td>
</tr>
<tr>
<td>Work Other</td>
<td>One end point is work and the other is not home. Examples: work lunch, trip from office to grocery</td>
</tr>
<tr>
<td>Other Other</td>
<td>Ends are neither work nor home. Examples: dinner-theater, grocery-dry cleaner.</td>
</tr>
<tr>
<td>Serves Passengers</td>
<td>Example: dropping child at school</td>
</tr>
<tr>
<td>Visitor</td>
<td>Any trip generated by non-San Diego residents</td>
</tr>
<tr>
<td>Regional Airport</td>
<td>Trips generated by regional airport facilities</td>
</tr>
</tbody>
</table>

Using the land use and demographic information from the 2050 Regional Growth Forecast, SANDAG estimates the number of person trips generated in each Transportation Analysis Zone (TAZ). SANDAG develops a set of TAZs (see Attachment 1) to aggregate areas of homogenous land uses and simplify the computer power needed to run the model. The TAZ system simplifies the region from nearly 1 million parcels to 4,670 zones (plus 12 external zones representing Orange, Riverside, and Imperial Counties and Baja California, Mexico) resulting in a matrix of 22 million zone combinations instead of 1 trillion combinations using parcels.

Based on the land use in each zone, SANDAG estimates the number of person trips (car, carpool, transit, walk, and bike) that are generated in the zone. In reality, some land uses will generate fewer person trips than estimated while others will generate more, but on average the rates are accurate when aggregated to the regional level. Trip rates are estimated from observed data collected by SANDAG over the last three decades, augmented by the Institute of Transportation Engineers’ Trip Generation Manual, and published in the SANDAG Traffic Generators Manual. Finally, trip rates for certain zones may be modified in order to more accurately reflect current, observed traffic counts and transit ridership.

**Example:** The average small-lot, single-family home in the San Diego region generates ten person trips. An example breakdown of real-world trips for a family of three in a small-lot, single-family home in Solana Beach might include: (1 and 2) mother bikes with daughter to school, (3) mother
bikes home from school, (4) mother walks to COASTER for work in downtown San Diego, (5) father drives to work in Rancho Bernardo, (6) mother returns home from work, (7) mother bikes to pick up daughter, (8 and 9) mother and daughter return via bike from school, and (10) father returns home from work. In the SANDAG model, all of the trips from homes on this fictional family’s block would be aggregated into one TAZ. Similar calculations are done for each land use in the San Diego region.

**Trip Distribution**

With the number of person trips produced and attracted for each zone from the previous step, the SANDAG model matches each production to an attraction. This step will match trip ends of trips with the same purposes, so home-based college trip attractions at Cal State San Marcos will be matched with home-based college trip productions around the region.

SANDAG uses an enhanced gravity model to match productions and attractions; a transportation gravity model is loosely based on Sir Isaac Newton’s Law of Universal Gravitation using zone size, attractiveness, and the distance or travel time between the zones to match trip ends.

**Example:** Fashion Valley is one of the largest shopping centers in the San Diego region. Because of its size, Fashion Valley will attract patrons from a much larger geographic area than a neighborhood corner store. In this step, home-based shopping trip productions from all over the region will be matched with Fashion Valley trip attractions, and the local corner store will primarily be matched with trips from the immediate neighborhood.

In context of a traditional gravity model, Fashion Valley would be analogous to the sun attracting the nine planets in our solar system, while the corner store might be thought of as Mars, which is large enough to attract two moons, but not the rest of the planets.

**Mode Choice**

The mode choice step selects the most efficient transportation mode (drive alone, carpool, transit, walk, bike, etc.) for each trip, based on access, traveler’s income, trip purpose, parking costs, fuel price, transit fares, travel time, and other time and pricing parameters. Mode choice assumes that travelers make logical decisions about which form of transportation to take based on accurate information about the time and cost of completing a trip by alternative modes. In reality, a driver or transit rider rarely knows every possible alternative or considers all of the costs; however, SANDAG continues to make Transportation Systems Management (TSM) investments like 5-1-1 to make improved traveler information a reality in the future.

The mode choice step also computes mode use separately for two time periods: peak and off-peak. The peak period extends from 6 to 9 a.m. and from 3 to 6 p.m. The off-peak period covers the remaining 18 hours of the day. It is important to evaluate mode use separately for the two time periods, because the quality of service can vary dramatically by mode. For example, transit operators often provide more frequent transit service during peak hours, reducing wait times for transit riders. Conversely, highway congestion is at its worst during peak hours, making auto modes less attractive relative to transit.

The mode choice model is commonly criticized for underestimating future transit use of expanded transit alternatives, because model calibration is based upon current conditions. However, the model estimates transit use for each zone-to-zone movement based upon the quality of transit service relative to other modes. Existing trolley corridors provide a basis for determining potential
transit use with high quality transit service. As more light rail, bus rapid transit (BRT), and rapid bus services are provided, the model recognizes the resulting transit service improvements and shifts travel to transit from other modes.

Example: A student living in downtown San Diego has a number of transit mode options for getting to school at San Diego State University. For example, the student could take the trolley or local bus. The trolley trip is about five minutes faster, but the trolley fare is $0.25 more than the local bus. The mode choice step will determine which tradeoff the traveler is willing to make based on trip purpose, income, mode desirability, and proximity to the proper transit stops.

Traffic Assignment

The result of the previous three steps is a set of Origin to Destination (O-D) trip tables describing the number of trips by mode by time period from one zone to another. During traffic and transit assignment, the model places each trip on the most efficient route based on the mode, network congestion, speed, and tolls. Mixed-flow transit vehicles (e.g. buses that operate on general purpose lanes/streets) are hampered by congestion on the road network while trolleys and buses on dedicated guideways operate at full speed. In the RTP base year, the SANDAG model assigns more than 17 million trips for a typical weekday.

Example: For a drive alone, home-based work trip from Carlsbad to Sorrento Mesa, the model can choose a route along Interstate 5 or use local arterials. During traffic assignment, which runs iteratively to equilibrium, the model will initially attempt to route all trips down Interstate 5. However, as a response to congestion from the initial assignment, some traffic will be routed down Coast Highway or El Camino Real. The traffic assignment model will iterate until all trips are assigned the most efficient route for their mode.

Feedback

After all of the steps are completed, the SANDAG model returns to the trip distribution step and runs through traffic assignment, updating trip information based on congestion levels and travel times from the last iteration. The SANDAG model iterates to ensure the model network reaches equilibrium.

Example: In the first model iteration, nearly all of the auto trips between western Escondido and downtown San Diego will be routed down Interstate 15. However, all of the cars travelling between Escondido and downtown San Diego would cause extreme congestion. During the second model run, some trips may be assigned to destinations closer to home in the trip distribution step to avoid congestion realized during the previous step. In the third run, some of the remaining travelers may switch modes to the Express Bus to avoid general purpose lane traffic altogether. This process continues until the process reaches equilibrium and every trip is using the most efficient mode and route possible.

Next Generation Models

Activity-Based Modeling

Activity-based modeling (ABM) is a paradigm shift in transportation modeling allowing a more complex analysis of infrastructure investment, social equity, and traveler behavior. Unlike the zonal trip accounting system based on land use trip generation in the traditional four-step models, ABM models each individual person’s travel choices on an average weekday in the San Diego region. Six
MPOs have implemented an ABM, and eight MPOs (including SANDAG) are actively developing activity-based models. Activity-based models are recommended by the California Transportation Commission for the four largest MPOs in the state. SANDAG anticipates using the ABM for the development of the next update to the RTP scheduled for adoption in 2015. The activity-based transportation model allows for more complex analysis of Transportation Demand Management (TDM) policies, traffic congestion, social equity, and tolling and pricing.

Activity-based models, while significantly more complex structurally, are conceptually easier to understand than the traditional four-step models, because ABM describes daily trips like going to work and picking up dry cleaning and enforces time constraints and travel modes in a way that’s easier for lay people to understand. The following sections describe the major components of the ABM (refer to Attachment 2):

- Population Synthesis
- Long-Term Choice Models
- Mobility Choice Models
- Daily Activity Pattern Models
- Tour Models
- Trip Models
- Traffic Assignment

**Population Synthesis**

The ABM does not model the personal travel behavior of each and every San Diegan, so, in order to simulate the travel behavior of 4.5 million San Diego residents in 2050, SANDAG builds a representative population that looks like the real San Diego. For example in 2050, SANDAG projects about 55,000 people will live in 31,000 housing units with a median household income around $71,000 in the Uptown Community Planning Area. SANDAG can estimate the general characteristics of the community, but we do not know the make-up of individual households. SANDAG uses U.S. Census Bureau data to fill in the household information and create a synthetic population for 2050.

Every year the U.S. Census Bureau publishes information, collected as part of the American Community Survey, about a sample list of households within San Diego County. The Census data are a random selection of households that complete the annual survey, providing information about income, employment, education, family size, and dwelling type. SANDAG draws households at random from this list to build a population that matches the ethnic, demographic, and economic characteristics of the San Diego region. In the Uptown example above, the average household size is 1.8 and the median income is $71,000, so the population synthesizer will draw households from the Census until it has 31,000 households with an average household size of 1.8 and a median income near $71,000. The population synthesizer balances population characteristics across 34 control categories.

**Long-Term Choice Models**

Once a representative population is developed, the model assigns work or school location to each employed person or student in the population. Since work and school are considered mandatory by most people, travel decisions are often dictated by work and school schedules of people in their household. The work location is based on many of the same factors affecting trip distribution in the four-step model, including travel time, land use, pricing, and network congestion. ABM also
matches occupation types to household characteristics allowing for greater jobs / housing fit analysis.

**Example:** A household in Chula Vista is composed of five people, three adults and two children. In the long-term choice modules, ABM assigns each family member a long-term activity location. In this household, the children are 2 and 6, so the younger child is assigned preschool age, and the older child is assigned as a pre-driving age student. The adults are a mother and father and a retired grandmother. From the population synthesizer, the parents are assigned as full-time workers, and the grandparent is assigned as retired. Since the student and the two parents are assigned statuses requiring them to leave the home most days, they also are assigned a workplace or school location. The father is assigned to work at QUALCOMM, and the mother is assigned to Sharp Hospital. The student is assigned to Eastlake Elementary.

**Mobility Choice Models**

After work and school locations are set for all of the representative residents, the model determines how many cars, if any, are available to each household, workplace parking costs, and transponder ownership. The number of cars assigned to each household is based on household income, work location, number of driving age people, and transit availability. Auto ownership is a key variable in mode choice later in the model. Workplace parking costs and transponder ownership are key variables in determining whether someone will take transit to work or use toll roads.

**Example:** Continuing with the family above, based on their upper income status and three driving age adults, the household has three cars, and the father has a FasTrak transponder to use the South Bay Expressway on his way to work. Since both employed parents work outside of traditionally parking constrained areas, their realized workplace parking costs are assumed to be zero.

**Daily Activity Pattern Model**

The Daily Activity Pattern model assigns travel patterns to each modeled individual in the San Diego region for a typical day. The daily activity patterns are broken down into three components: mandatory activities, non-mandatory activities, and stay at home.

Mandatory activities such as going to work or school are assigned first by the model since most households coordinate activities around jobs and school. Each activity is time blocked, so only one activity happens at a time. For example, the model will not allow someone to go to work from 8 a.m. to 5 p.m. and also allow them to attend part-time school from 1 p.m. to 4 p.m. Once work and school times have been blocked out for each traveler, residual time is available for non-mandatory activities. If a person is not a student or member of the labor force, they will not be assigned any mandatory activities, and the whole day remains available for non-mandatory activities. Certain non-mandatory activities related to work or school are identified here as well, such as dining out at lunchtime.

Non-mandatory activities are any activity that is not related to work or school. Non-mandatory activities are assigned based upon available time and other socioeconomic characteristics of each resident. In addition to assigning non-mandatory activities, the model also reviews the time availability of other household members and determines whether activities are completed alone or jointly.
Example: Continuing the example from above, mandatory activities are established first. Of the five people living in the household, three are eligible for a mandatory activity. The father and student are assigned to go to work and school on the modeled day. The father also is assigned to eat his lunch at the Karl Strauss near QUALCOMM. The mother, however, is determined by the model to stay home on the modeled day. It could be the younger child is sick, or she only works three days a week as a nurse.

Once the mandatory activities are assigned, the model assigns non-mandatory activities. In this example, because the mother and younger child were not assigned a mandatory tour, they are assigned a trip to the zoo and grocery store. The retired grandmother is assigned a walk around the neighborhood with her friend. The student is assigned no additional trips beyond going to school. The model attempted to assign a discretionary doctor trip for the father, but there is not enough extra time in his daily schedule to drive to La Jolla for the appointment, so the model cancels the trip. The model however does assign a morning coffee stop for the father.

**Tour and Trip Level Models**

Once all of the activities have been assigned, the model organizes each person’s activities into a set of tours composed of the trips between each activity. All tours begin and end at home with the exception of some work tours. Once the tours are identified, the model assigns a primary mode for the tour. In concept, the ABM mode choice is similar to the four-step mode choice, but in fact, it is much more complicated using more socio-economic indicators and auto-ownership indicators from earlier model steps.

The tour level models also identify any activity-chaining based on time availability, convenience, and activity types.

The trip models are similar to the tour models, but the trip models make choices and determinations about each individual leg of the tour. For example, the tour’s primary mode may be driving for a work tour, but the traveler can walk or take transit to lunch or a meeting. Likewise, if a traveler takes transit to work, the traveler does not have a car available for lunch or work trips, but could become a carpooler or pedestrian.

Example: Once all of the trips have been assigned, the model assigns that both the mother and father will use a car for their primary travel mode while the grandmother will walk. However, the father will switch modes to walking to get his morning cup of coffee after parking his car at his office.

**Traffic Assignment and Feedback**

The final step of the ABM is the same as the four-step model, traffic assignment. The ABM uses the same tools and framework as the four-step model for identifying the most effective path for each trip.

The ABM also relies on feedback similar to the four-step model to ensure model equilibrium.
Land Use and Economic Modeling

Regionwide Projections

The first step in the forecast process is to develop a regionwide growth projection of population, jobs, housing, and other demographic and economic characteristics. The regionwide projections are developed using the Demographic and Economic Forecasting Model (DEFM), which has had a 40-year track record of accurate regionwide projections.

The DEFM model is comprised of both an econometric model and a demographic model, which are linked through a few key variables. The econometric component of DEFM is calibrated based on 40 years of historical economic trend data such as jobs (by industry sector), unemployment, income, prices, and construction activity. The demographic component of DEFM is a cohort-component model, meaning that the population projections are driven by the age, gender, and race/ethnic characteristics of the existing population, and by the effects of life expectancy, birth rates, and migration trends. The models are linked through labor force participation, household formation, and migration. For example, when the unemployment rate is low in the econometric model, labor force participation rates rise in the demographic model. When job growth is high in the econometric model, domestic migration increases in the demographic model. When home prices are low, more people are encouraged to enter the housing market, and average household size falls.

Subregional Projections

The regionwide projections then become one input into the subregional, or neighborhood-level, forecast. The second key component of the subregional forecast is local land use data, developed through extensive collaboration with each of the 18 cities and the County of San Diego, as well as other land use agencies such as the tribal governments and Department of Defense. The local land use inputs incorporate such information as existing development, general plans, constraints to development (e.g., floodplains, steep slopes, habitat preserves, historic districts, building height restrictions, and zoning), and permitted projects in the development pipeline. The final building blocks of the subregional forecast are proximity to existing job centers (along with travel time and commute choice information), and historical development patterns. These four key inputs influence the probability of a neighborhood’s future growth. The results of this model are then reviewed by each local jurisdiction’s staff, and the final forecast is adjusted based on local feedback.

PECAS

In conjunction with the ABM development, SANDAG staff is also working to implement the state-of-the-art land use and econometric modeling framework, Production Exchange and Consumption Allocation System (PECAS). PECAS will replace the SANDAG subregional land use forecast model for the Series 13 growth forecast (for use in the RTP scheduled for adoption in 2015). All of the four major MPOs in California are currently developing PECAS land use models to replace or enhance existing land use modeling frameworks.

PECAS has a number of advantages over the existing sub-regional Urban Development Model (UDM). First, it forecasts the level of economic activity generated by businesses, households and governments within the region by modeling the local economy. It does so by analyzing the economic relationships among internal and external producers and consumers. Part of the analysis is the estimation of the cost of transporting goods and services between producers and consumers. These costs provide an economic rationale for the location of firms and households, since both try to minimize their cost of doing business. Furthermore, this economic rationale impacts rents, since
there is a tradeoff between the cost of rent and the cost of transportation; that is, higher geographic accessibility is usually associated with lower transportation costs but higher rents. Second, PECAS directly accounts for the cost of producing space and compares that cost to the expected rents that the space will generate. Thus, only space that will return a profit is allowed to develop in areas where the cost of transportation is manageable. It is these characteristics of PECAS that make it more sensitive to both land use and transportation policies than other land use models. Furthermore, because of the importance of transportation costs to PECAS, it integrates more directly with the transportation model.

Peer Review

All of the SANDAG models undergo extensive peer evaluation to ensure consistency with national best practices, FTA New Starts requirements, and local data trends. In 2005, SANDAG participated in the Federal Highway Administration (FHWA) Travel Model Improvement Program (TMIP) Peer Review Program. The TMIP program ensures that technical processes are applied and developed to meet standards of professional practice as well as federal and state requirements. The TMIP Review found the SANDAG model consistent with the state of the practice (http://tmip.fhwa.dot.gov/resources/clearinghouse/docs/tmip/peer_review/sandag/).

Additionally, the SANDAG ABM and PECAS teams regularly convene advisory panels of leading modeling experts from across North America to review and comment on the new model development.

Next Steps

SANDAG will be presenting the RTP model documentation and validation and sensitivity test results with the release of the draft 2050 RTP and its Environmental Impact Report.

GARY L. GALLEGOS
Executive Director

Attachments: 1. 2050 RTP Transportation Analysis Zones map
2. Activity-Based Transportation Model flowchart

Key Staff Contact: Clint Daniels, (619) 699-6946, cdan@sandag.org
2011 SDAPA Awards
“A Celebration of North Park”

2011 Jury:

- Christine Rothman, City of San Diego
- Jeff Murphy, County of San Diego
- Mary M. Lydon, ULI
- Elyse Lowe, Move San Diego
- Mirle Rabinowitz Bussell, Ph.D., UCSD Urban Studies and Planning

Guest Speaker:

- Todd Gloria, San Diego City Council Member District 3

First Place Award Winners:

Innovation in Green Community Planning
Centre City Green
CCDC

Focused Issue Planning
Chula Vista Bayfront Master Plan EIR

Best Practices
Wireless Telecommunications Facility Permit Review Process
County of San Diego, DPLU

Education Project
The Village at Market Creek Design and Planning Workshops

Grassroots Initiative Award
Sustainable San Diego Project
San Diego Housing Federation
2011 SDAPA Awards
“A Celebration of North Park”

Neighborhood Planning
Mercado del Barrio
Safdie Rabines Architects

Advocacy/Social Change/Diversity Planning
Community Housing Works
Homeownership Center

Hard Won Victories
State Route 15: The Fight for Follow-on Commitments and Promised Facilities

Media Award
Think Blue
The City of San Diego

Special Recognition Award Winners:

American Planning Association & Walk San Diego
Award of Special Recognition
Complete Streets Implementation
The City of La Mesa

Community Recognition
North Park
North Park Historical Society

City of La Mesa - Stormwater Treatment Features

Streets are Now a Focal Point of Several Major Planning Trends and Initiatives

Design and Planning Workshops – The Village at Market Creek
The San Diego Association of Governments (SANDAG), in consultation with the California Department of Housing and Community Development (HCD), is required by California state law to undertake a Regional Housing Needs Assessment (RHNA) prior to each housing element cycle for the 19 local jurisdictions in the San Diego region -- the 18 cities and County of San Diego. The RHNA process has three main components:

- **RHNA Determination --** HCD regionwide housing need determination in four income categories: very low, low, moderate, and above moderate for the housing element cycle;
- **RHNA Plan --** SANDAG plan to distribute the RHNA Determination to the local jurisdictions in four income categories; and
- **RHNA Allocation --** each jurisdiction’s housing need assessment in four income categories for use in updating local housing elements.

The RHNA process for the eight-year, fifth housing element cycle (January 1, 2013 – December 31, 2020) is being conducted in conjunction with the development of the 2050 Regional Transportation Plan (RTP) and its Sustainable Communities Strategy (SCS) in accordance with Senate Bill (SB) 375 (Steinberg).

**RHNA/SCS Consistency**

SB 375 requires consistency between the RHNA and the development pattern of the SCS. It also requires that the SCS land use pattern, and therefore the RHNA, assist the region in meeting the greenhouse gas (GHG) reduction targets set by the California Air Resources Board (CARB).

**RHNA Determination**

The overall regionwide housing need for the housing element cycle is based on projections from the California Department of Finance and the SANDAG 2050 Regional Growth Forecast, and on assumptions about the formation rates for new households, vacancy rates, household size, and demolitions, and data from the U.S. Census.

**RHNA Methodology and Allocation**

The Draft RHNA Methodology and Allocation accepted for distribution and comment by the SANDAG Board of Directors on May 27, 2011, for a 60-day public review, is based on the land use pattern in the 2050 RTP and SCS and the 2050 Regional Growth Forecast, which reflects the region’s local general and community plans. These plans indicate that approximately 80 percent of our projected new housing will be multifamily, and 83 percent of our housing in 2050 will be located within a half-mile of high frequency (15 minute headways) transit service. The Draft RHNA Methodology and Allocation distributes housing in accordance with the four RHNA objectives in state law: by reflecting the region’s commitment to planning for housing for all income levels in all jurisdictions, balancing jobs and housing, focusing development in urban areas, and protecting our rural areas, open space, and habitat lands.

**RHNA Process and Public Involvement**

SANDAG worked with the region’s planning directors (Regional Planning Technical Working Group) and Regional Housing Working Group to develop the Draft RHNA Methodology and Allocation to distribute (Continued on reverse)
Regionwide Distribution of RHNA Determination by Income Category
January 1, 2010 – December 31, 2020 (RHNA Projection Period)

<table>
<thead>
<tr>
<th>Income Categories</th>
<th>%</th>
<th>units</th>
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<tbody>
<tr>
<td>Very Low</td>
<td>22.5%</td>
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<tr>
<td>Low</td>
<td>17.1%</td>
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<td><strong>Total</strong></td>
<td><strong>41.5%</strong></td>
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The development of the Draft RHNA Methodology and Allocation took place over a 12-month period during numerous public meetings conducted by the working groups, Regional Planning Committee, and SANDAG Board of Directors.

To read more about the RHNA and to comment on the Draft RHNA Methodology and Allocation, visit www.sandag.org/rhna. Public comments will be accepted through July 28, 2011.

Draft RHNA Methodology and Allocation*

<table>
<thead>
<tr>
<th></th>
<th>11-Year RHNA</th>
<th>Very Low</th>
<th>Low</th>
<th>Moderate</th>
<th>Above Moderate</th>
<th>VL + Low**</th>
<th>20+ du/acre</th>
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<td>2,332</td>
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| **Total** | **36,450** | **27,700** | **30,610** | **67,220** | **64,150** | **241,817** |**

* Table 2b. Lower Income Capacity Option. This table excerpted from the May 27, 2011 RHNA Board Report.

** Allocation proposal is based on estimated existing plan capacity, or regional allocation, whichever is lower in jurisdictions where estimated existing plan capacity is exceeded.

June 2011
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**Failed**

**Agenda Item #10**

Draft Regional Housing Needs Assessment for the 2013-2020 Housing Element Cycle

**Action: ACCEPT OPTION 3D**

Board of Directors Meeting, May 27, 2011

Y Yes  N No  A Abstain  NP - Not Present
### Agenda Item #10

Draft Regional Housing Needs Assessment for the 2013-2020 Housing Element Cycle

**Action:** ACCEPT OPTION 2B

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**Total**

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(74%) (83%)

Board of Directors Meeting, May 27, 2011

Y Yes  N No  A Abstain  NP - Not Present