MEETING NOTICE AND AGENDA

CITIES/COUNTY TRANSPORTATION ADVISORY COMMITTEE

The Cities/County Transportation Advisory Committee may take action on any item appearing on this agenda.

Thursday, November 6, 2014

9:30 to 11 a.m.

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

Staff Contact: Alex Estrella
(619) 699-1928
alex.estrella@sandag.org

AGENDA HIGHLIGHTS

• DRAFT REGIONAL COMPLETE STREETS POLICY

• STATUS REPORT ON CALL-FOR-PROJECTS FOR TransNet SMART GROWTH INCENTIVE PROGRAM AND ACTIVE TRANSPORTATION GRANT PROGRAM

SANDAG offices are accessible by public transit.
Phone 511 or see 511sd.com for route information.
Secure bicycle parking is available in the building garage off Fourth Avenue.

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.
CITIES/COUNTY TRANSPORTATION ADVISORY COMMITTEE
Thursday, November 6, 2014

ITEM NO.                      RECOMMENDATION

1.  WELCOME AND INTRODUCTIONS

2.  PUBLIC COMMENTS

Members of the public shall have the opportunity to address the Cities/County Transportation Advisory Committee (CTAC) 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 meeting coordinator prior to speaking. Public speakers should notify the meeting coordinator if they have a handout for distribution to working group members. Public speakers are limited to three minutes or less per person. CTAC members also may provide information and announcements under this agenda item.

3.  APPROVAL OF MEETING MINUTES

   APPROVE

   +3A. The CTAC is asked to review and approve the minutes from its June 5, 2014, meeting.

   +3B. The CTAC is asked to review and approve the minutes from its September 4, 2014, meeting.

REPORTS

4.  CITIES/COUNTY TRANSPORTATION ADVISORY COMMITTEE
    REPRESENTATION TO PUBLIC HEALTH STAKEHOLDER GROUP
    (Dan Gallagher)

   APPOINT

   Staff is requesting that Committee Members appoint a representative of CTAC for the Public Health Stakeholder Group (PHSG.) The purpose of the PHSG is to engage a wide range of perspectives and sectors in the development of San Diego Forward: The Regional Plan. The PHSG was initially established to provide input on specific activities funded through a United States Center for Disease Control and Prevention Community Transformation Grant. While the grant funded activities were completed at the end of September 2014, the SANDAG Board of Directors allocated funding to continue health considerations in SANDAG policies, projects, programs, and plans. This will also allow the PHSG to continue through the San Diego Forward: The Regional Plan update anticipated to be complete in the summer/fall of 2015.
+5. **DRAFT REGIONAL COMPLETE STREETS POLICY (Stephan Vance)**

Development of a regional Complete Streets policy is a commitment made by the SANDAG Board of Directors with the approval of the 2050 Regional Transportation Plan in October 2011. Based on feedback on the Complete Streets discussion paper from regional stakeholders, a draft Complete Street streets policy has been developed that is presented for a recommendation to the Transportation Committee.

+6. **STATUS REPORT ON CALL-FOR-PROJECTS FOR TransNet SMART GROWTH INCENTIVE PROGRAM AND ACTIVE TRANSPORTATION GRANT PROGRAM (Carolina Gregor)**

The Regional Planning and Transportation Committees will be considering the scoring criteria and program guidelines for the third cycles of the TransNet Smart Growth Incentive Program (SGIP) and Active Transportation Grant Program (ATGP) at their November meetings. The CTAC is asked to discuss a proposal to raise the funding cap on the SGIP from $2 million to $3 to 4 million. Attached as background information is the Regional Planning Committee report.


Staff will provide the quarterly TransNet financial balances for the Local Street and Road Balances. The information is planned to be presented to the Independent Taxpayers Oversight Committee on Wednesday, November 12, 2014.

+8. **REGIONAL TRANSIT ORIENTED DEVELOPMENT STRATEGY (Susan Baldwin)**

Staff will provide a status update on the Regional Transit Oriented Development (TOD) Strategy now underway, and will show slides from the TOD network tour undertaken with the consultant team. Staff also will report on the results of the stakeholder focus groups held in July and August on the Regional TOD Strategy and solicit input from CTAC on TOD issue areas. Two items are attached: Item 8A is the Transit Oriented Development Strategy For The San Diego Region Fact Sheet and Item 8B is the Preliminary Focus Group Theme Summary.

9. **CALTRANS UPDATES**

Caltrans will provide an update on various local programs, funding program deadlines, and announcements regarding upcoming conferences.

10. **ADJOURNMENT AND NEXT MEETING**

The next CTAC meeting is scheduled for Thursday, December 4, 2014.

+ next to an agenda item indicates an attachment
JUNE 5, 2014, MEETING MINUTES:

The meeting of the Cities/County Transportation Advisory Committee (CTAC) was called to order by Chair, Mario Sanchez (City of El Cajon) at 9:40 a.m.

1. WELCOME AND INTRODUCTIONS

All members in attendance were captured under Item No. 3 (Approval of Meeting Minutes).

2. PUBLIC COMMENTS

Members of the public had the opportunity to address the CTAC on any issue. There were no public comments.

3. APPROVAL OF MEETING MINUTES (APPROVE)

Item 3A: Approval of April 3, 2014, meeting minutes.

Action: Upon a motion by Mohammed Sammak (City of Solana Beach), and a second by Kuna Muthusamy (City of National City), the meeting minutes of the April 3, 2014, CTAC meeting were approved.

Yes: Frank Rivera (City of Chula Vista), Tim Thiele (City of Del Mar), Mr. Sanchez, Julie Procopio (City of Escondido), Hank Levien (City of Imperial Beach), David DiPierro (City of Oceanside), Linda Marabian (City of San Diego), Sirius Doylamian (County of San Diego), Paul Vo (City of San Marcos), Minjie Mei (City of Santee); No: None; Abstain: Ed Deane (City of Encinitas); Absent: None.

Item 3B: Approval of May 1, 2014, meeting minutes upon text revision of Agenda Item 5: Regional Arterial Management System Update to state, “Due to a lack of quorum, staff will be requesting the recommendation during the June CTAC meeting.”

Action: Upon a motion by Mr. Rivera, and a second by Mr. Deane, the meeting minutes of the May 1, 2014, CTAC meeting were approved.

Yes: Mr. Sanchez, Ms. Procopio, Mr. Levien, Mr. Muthusamy, Mr. DiPierro, Ms. Marabian, Mr. Doylamian, Mr. Sammak, Mr. Vo, Mr. Mei; No: None; Abstain: Mr. Thiele; Absent: None.
4. REGIONAL ARTERIAL MANAGEMENT SYSTEM UPDATE (RECOMMEND)

James Dreisbach-Towle (SANDAG) revisited this item from the May 1, 2014, CTAC meeting and provided an update on current regional maintenance and support efforts for the Regional Arterial Management System (RAMS). At the April 2013 meeting, CTAC members approved a second year of RAMS operations based on the regional model recommended by SANDAG staff and San Diego Regional Traffic Engineers Council. SANDAG staff is seeking that CTAC recommend continuation of the regional fund pool to continue hardware and software maintenance of the RAMS system for FY 2015.

Operational costs of supporting and maintaining RAMS cover: (1) QuicNet4+ software support by McCain, Inc.; (2) warranties on the server and network hardware; and (3) telecommunications support. The annual cost for regional RAMS operations in FY 2014 was $236,000 for the 16 participating agencies and will remain the same for FY 2015. Staff has determined that FY 2015 maintenance agreement provisions will not see a cost increase in the software support agreement, network communications, or hardware warranty support. In FY 2015, server hardware will be replaced as the warranty for the servers end in June 2015.

Action: Upon a motion by Ms. Marabian, and a second by Mr. Mei, CTAC recommended continuation of the regional pool fund to continue hardware and software maintenance of the RAMS system for FY 2015.

Yes: Mr. Rivera, Mr. Sanchez, Ms. Procopio, Mr. Muthusamy, Mr. DiPierro, Mr. Doylamian, Mr. Vo; No: None; Abstain: Mr. Thiele, Mr. Levien, Mr. Sammak; Absent: None.

5. TransNet SMART GROWTH INCENTIVE PROGRAM AND ACTIVE TRANSPORTATION GRANT PROGRAM: CALL FOR PROJECTS FOR THIRD CYCLE OF GRANT FUNDING (DISCUSSION)

Carolina Gregor (SANDAG) discussed the upcoming call for projects for the third cycles of the TransNet Smart Growth Incentive Program (SGIP) and Active Transportation Grant Program (ATGP). The TransNet Extension ordinance provides funding for both the SGIP and ATGP. Due to the similar timeframes and program elements, staff is conducting the third cycle of call for projects for these two grant programs simultaneously.

Minor changes are proposed to the program guidelines for both programs for this next cycle to ensure consistency with the 2050 Regional Transportation Plan/Sustainable Communities Strategy (2050 RTP/SCS) and Riding to 2050: The San Diego Regional Bicycle Plan. Staff is proposing to include references to reductions of Greenhouse Gas (GHG) emissions and Vehicle Miles Traveled (VMT) in the program objectives and other sections of the program guidelines will be strengthened in an effort to continue to incentivize local jurisdictions to plan or build projects that reduce GHG emissions and VMT. In addition, staff proposes to remove the ATGP Capital Grants Program over/under $500,000 threshold category distinction. The $500,000 threshold established two categories or projects: projects over $500,000, and projects of $500,000 or less. Staff is proposing to eliminate these category distinctions as part of Cycle 3 for two reasons: (1) a smaller volume of grant applications is expected for the ATGP resulting from a redirection of funds toward the Bike Early Action Program approved last year; and (2) the category distinction did not result in the expected outcome of evening the playing field between smaller and larger jurisdictions, as was originally anticipated.
Next, staff proposes modifications to both programs to require a minimum local match of 20 to 30 percent of the total project cost. Currently, neither program requires matching funds, but both programs provide points for matching funds. A general consensus among CTAC members were against the proposed matching fund requirement.

In addition to the SANDAG grant applications, the California Transportation Committee (CTC) is administering a statewide Active Transportation Program (ATP) consisting of both statewide and regional competitions. The statewide competition applications were due in May 2014, and the regional competition applications will be due on June 13, 2014. SANDAG, as the region’s Metropolitan Planning Organization (MPO), will act as the administrator for the regional competition. Local agencies may check the status of their ATP grant application or submit their ATP grant application/supplemental application to Jenny Russo at jenny.russo@sandag.org.

Since the CTC will adopt the SANDAG recommended regional projects in November 2014, sufficient time would be available for jurisdictions to decide whether to resubmit unfunded regional applications to the local ATGP. As TransNet eligibility requirements apply to the SGIP and ATGP applications, staff will take a look at the TransNet Ordinance and Expenditure Plan Implementation Guidelines to ensure that specific projects types are eligible for grant funding. Staff anticipates the SANDAG Board of Directors to release the Call for Projects in October 2014, with both the SGIP and ATGP applications due on February 3, 2015. Applications are expected to be evaluated in the spring 2015, with the SANDAG Board of Directors approving projects in June 2015 and grant agreements executed in October 2015.

6. TransNet LOCAL STREET AND ROAD PROGRAM QUARTERLY REPORT (INFORMATION)

Lisa Kondrat-Dauphin (SANDAG) provided CTAC members with the Local Agency Street and Road Balances sheet (as of March 31, 2014) and provided feedback from the May 2014 Independent Taxpayer Oversight Committee (ITOC) meeting regarding TransNet financial reports. The balance sheet lists each agency’s committed funds for local streets and roads as of March 31, 2014. The balance sheet also highlights the agencies whose estimated committed funds as of March 31, 2014, fall below the 75 percent threshold. ITOC requests that local jurisdictions who fall below the threshold submit letters providing an explanation of local agency street and road balances. It is recommended that local jurisdictions that are requested to submit a letter of reasoning include potential challenges in programming Local Street and Road Program funding. Staff will determine whether local jurisdictions whose estimated committed funds continually falls below 75 percent will need to submit letters of reasoning to ITOC on a quarterly basis.

7. REGIONAL TRANSPORTATION CONGESTION IMPROVEMENT PROGRAM: DISPOSITION OF FUNDING PROGRAM REVENUES (INFORMATION)

Ariana zur Nieden (SANDAG) informed CTAC members that local jurisdictions must expend or commit Regional Transportation Congestion Improvement Program (RTCIP) funds within seven fiscal years of obtaining revenues. The RTCIP, an element of the TransNet Extension Ordinance, requires the 18 cities and the County of San Diego to collect an exaction from the private sector for each new housing unit constructed in their jurisdiction. The purpose of the RTCIP is to help ensure future development contributes its proportional share of the funding needed to pay for the Regional Arterial System (RAS) and related regional transportation facility improvements.
The TransNet Extension Ordinance provides for a specified term within which to expend or commit Funding Program revenues on RAS projects. The Ordinance further directs member agencies to transfer RTCIP revenue not expended or committed within the required timeframe to SANDAG unless a planned need for such fees can be demonstrated. Consistent with state and federal laws and with SANDAG requirements, local agencies are required to program any transportation projects funded with federal, state, or TransNet funds in an approved Regional Transportation Improvement Program (RTIP). Staff encourages agencies collecting RTCIP revenues to commit any unexpended RTCIP revenues approaching the seventh anniversary date by including designated projects in their respective capital improvement program, as applicable, and by programming RTCIP revenues in the RTIP.

8. INTERSTATE 15 INTEGRATED CORRIDOR MANAGEMENT PROJECT UPDATE (INFORMATION)

Alex Estrella (SANDAG) provided a status update on the Interstate 15 (I-15) Integrated Corridor Management (ICM) project. The I-15 ICM Project includes implementation of multi-agency response plans for addressing congestion. The I-15 ICM Project leverages the region’s existing transportation management systems including RAMS. SANDAG staff also presented a demonstration of the 511 San Diego mobile application, which features real-time traffic alerts and traffic camera views, FasTrak® tolling prices, and Metropolitan Transit System bus schedules and fare prices.

9. CALTRANS UPDATES (INFORMATION)

Caltrans provided the following updates:

- **Active Transportation Program**: On August 20, 2014, the CTC will adopt statewide and rural/small urban portions of the program. Projects not programmed will be distributed to large MPOs based on location.

- **Quality Assurance Program (QAP)**: Local agencies must have a QAP prior to receiving their “Construction Authorization” for a Federal-aid project. Local agencies must update their QAP every five years.

10. ADJOURNMENT AND NEXT MEETING (INFORMATION)

The next CTAC meeting is scheduled for Thursday, August 7, 2014 (tentative).
San Diego Association of Governments
CITIES/COUNTY TRANSPORTATION ADVISORY COMMITTEE

November 6, 2014

AGENDA ITEM NO.: 3B

Action Requested: APPROVE

SEPTEMBER 4, 2014, MEETING MINUTES

The meeting of the Cities/County Transportation Advisory Council (CTAC) was called to order by Chair, Mario Sanchez (City of El Cajon) at 9:40 a.m.

1. WELCOME AND INTRODUCTIONS

The attendance sheet for this meeting is attached.

2. PUBLIC COMMENTS

Members of the public had the opportunity to address the CTAC on any issue. There were no public comments.

3. APPROVAL OF MEETING MINUTES (APPROVE)

Review and approval of the June 5, 2014, meeting minutes were postponed due to the absence of a quorum.

4. QUARTERLY TransNet FINANCIAL REPORTS FOR THE PERIOD ENDING JUNE 30, 2014 (INFORMATION)

Lisa Kondrat-Dauphin (SANDAG) provided CTAC members with the Local Agency Street and Road Balances sheet (as of June 30, 2014). The balance sheet lists each agency’s committed funds for local streets and roads as of June 30, 2014. The balance sheet also highlights the agencies whose estimated committed funds as of June 30, 2014, fall below the 75 percent threshold. Staff requested that local jurisdictions who fall below the 75 percent threshold prepare a letter to be presented at the September 10, 2014, Independent Taxpayers Oversight Committee (ITOC) meeting. The letters must provide an explanation of local agency street and road balances and may be submitted to Lisa Kondrat-Dauphin at lisa.kondrat-dauphin@sandag.org by noon on Tuesday, September 9, 2014.

5. TransNet ROUTINE ACCOMMODATION OF BICYCLISTS AND PEDESTRIANS (DISCUSSION)

Stephen Vance (SANDAG) discussed the TransNet Extension Ordinance provision that requires all projects funded under the ordinance to provide accommodations for bicyclists and pedestrians. Guidance on implementation of this requirement is described in Rule 21 of SANDAG Board Policy No. 031. This rule requires SANDAG to evaluate the rule to ensure it is effectively encouraging
provision of a balanced transportation network without imposing an excessive cost burden on projects funded under the program.

SANDAG staff conducted a three-part evaluation of the requirement. The evaluation consisted of surveying local agency public works staff to collect data on how they implement the requirement and get their feedback on the process. In addition, SANDAG staff determined which projects include provisions to accommodate bicyclists and pedestrians based on information in the Regional Transportation Improvement Program (RTIP) database. Next, SANDAG staff conducted a field review of those projects to determine compliance with the requirement.

The evaluation of the implementation process revealed several issues. First, it was discovered that not all street maintenance overlay projects have included the minimum bicycle and pedestrian accommodation that the rule requires. There were also projects in which the required accommodation was provided did not cover the entire length of the project. Next, SANDAG staff discovered that the guidance in Rule 21 did not account for several project types, such as traffic signal installation or modification, street lighting, and median landscaping. As a result, revisions to the rule may be necessary to account for omitted project types and provide greater flexibility in implementation. SANDAG staff will be working with local agencies with projects that raised compliance questions to determine the best way to resolve these matters.

Furthermore, the evaluation suggests that adjustments to the documentation and reporting process must be made to program and track projects with regard to the routine accommodation requirement. SANDAG staff will prepare an evaluation report to ITOC. Upon receiving input from CTAC and ITOC, SANDAG staff will develop draft recommendations for any changes to the process, which will be presented to CTAC and the Active Transportation Working Group for review and comment, and then presented to the Transportation Committee for a recommendation to the Board of Directors.

6. 2014 TECHNICAL UPDATE OF SMART GROWTH CONCEPT MAP (INFORMATION)

Carolina Gregor (SANDAG) informed the CTAC of a technical update to the Smart Growth Concept Map. SANDAG staff has worked with local jurisdictions to identify smart growth areas, delete previously identified smart growth areas, and change existing boundaries. On September 11, 2014, the Regional Planning Technical Working Group (TWG) will be asked to recommend the updated Smart Growth Concept Map to the Regional Planning Committee for planning purposes and for use in the SANDAG Smart Growth Incentive Programs. The revised map will be posted on the SANDAG website.

7. SAN DIEGO FORWARD: THE REGIONAL PLAN: PREFERRED REVENUE CONSTRAINED TRANSPORTATION SCENARIO (INFORMATION)

Phil Trom (SANDAG) presented the draft revenue constrained preferred transportation scenario for San Diego Forward: The Regional Plan. In response to direction from the SANDAG Board of Directors and feedback from Policy Advisory Committees, SANDAG working groups, Community-Based Organizations, and the public, SANDAG staff has developed a Blended Scenario based on two draft Revenue Constrained Transportation Scenarios (Scenarios 1 and 2).
Scenario 1 emphasized strengthening existing transit corridors with “Express” services along existing Blue and Orange Trolley Lines and early operational efficiency improvements of the SPRINT. The proposed approach for the Managed Lanes network was the phasing of two Managed Lanes along Interstate 5 (I-5) and Interstate 805 (I-805) corridors earlier in the Regional Plan by 2025. Similar to Scenario 1, Scenario 2 provided for new Trolley services in the more densely populated areas, but unlike Scenario 1, it would implement limited stop express bus services instead of “Express” Trolley service along the Blue and Orange Trolley Lines for passengers making longer distance trips. For Managed Lanes, Scenario 2 proposed the initial development for all four Managed Lanes projects for segments of I-5 and I-805 at one time, phased later in the Plan by 2035.

The Blended Scenario includes all of the projects common to both Scenarios 1 and 2 in addition to a mix of several projects previously unique to Scenario 1 or 2. The Blended Scenario includes a rich network of Rapid Routes that preserves the seven unique routes from Scenario 2. Key differences include the advanced phasing of three important regional projects. These changes include early efficiency improvements on the SPRINT corridor to allow for 20-minute peak frequencies as well as the advanced phasing of the Rapid route from San Diego State University to the Palomar Trolley Station by 2025. Additionally, an extension of the Mid-Coast Trolley Line connecting with COASTER service in Sorrento Mesa is proposed by 2035. The Blended Scenario also includes enhancements to existing local bus routes, with frequencies planned at 15 minutes in key corridors by 2020 and ten minutes by 2035. Like Scenario 1, the Blended Scenario includes the early phasing of two Managed Lanes on I-5 from State Route 78 (SR 78) to Vandegrift and on I-805 between State Route 52 and State Route 163, as well as advanced phasing of I-5 South to support the proposed BRT service on that corridor. It also includes the early phasing of two Managed Lanes for the complete section of SR 78 from Interstate 5 to Interstate 15.

SANDAG staff will recommend the Blended Scenario to the Board of Directors at the September 12, 2014, Board of Directors meeting. Pending the acceptance of the Board of Directors, SANDAG staff would use the Blended Scenario as the Revenue Constrained Transportation Scenario for preparing the draft San Diego Forward: The Regional Plan. The draft Regional Plan and draft Environmental Impact Report are anticipated to be released for public review and comment in spring 2015.

8. CALIFORNIA DEPARTMENT OF TRANSPORTATION UPDATES (INFORMATION)

Caltrans provided the following updates:

- **New Office Bulletin Division of Local Assistance Office Bulletins 14-05: Risk Based Invoicing**: The invoice review process has been simplified. District 11 will be providing an overview of the Division of Local Assistance Office Bulletins 14-05 on September 16, 2014, at the Caltrans District 11 Garcia Room from 10:30 a.m. to 12 noon.

- **Active Transportation Program**: The California Transportation Commission (CTC) adopted the successful Statewide projects at its August 20, 2014, meeting. District 11 (D11) received 65 Active Transportation Program (ATP) Cycle 1 applications. Fifteen of these applications were selected and approved by CTC at its August 20 Meeting. The total ATP funds requested is $14,647,000, with total project costs of $18,552,000. Of the 15 D11 successful ATP applications, 14 are from the San Diego Region with a total project cost of $17,439,000, including ATP funds of $13,662,000.
• **Highway Bridge Program Survey:** The survey serves to update the Federal Transportation Improvement Program for all Highway Bridge Program and Proposition 1B Seismic Projects. The survey allows Caltrans to program funds on projects that are ready or nearly ready to deliver and provides Caltrans critical information for long term budgeting needs. Every attempt will be made to keep programming as requested in the completed survey but is not guaranteed. Surveys must be returned no later than close of business on September 12, 2014.

• **LLP 14-01-Local Assistance Procedures Manual Update Civil Rights and Disadvantaged Business Enterprise:** Local Assistance Procedures Manual Chapter 9 has been re-issued in its entirety. References to Annual Anticipated Disadvantaged Business Enterprise Participation Level and Underutilized Disadvantaged Business Enterprise are removed. Agencies may now consider the goal commitment of the second and third bidders when evaluating the Disadvantaged Business Enterprise responsiveness of the low bidder. Several sections have been rewritten to clarify responsibilities, reduce redundancy, and maintain consistency with current laws, regulations, and exhibits.

• **Southern California Local Assistance Management Meeting:** Meeting will be held on September 25, 2014, from 9 a.m. to 3 p.m. at the County of San Diego Operations Center Room 171 (5560 Overland Avenue, San Diego, CA 92123).

9. **ADJOURNMENT AND NEXT MEETING (INFORMATION)**

The next CTAC meeting is scheduled for Thursday, October 2, 2014.
**CITIES/COUNTY TRANSPORTATION ADVISORY COMMITTEE**  
**MEETING ATTENDANCE FOR SEPTEMBER 4, 2014**

<table>
<thead>
<tr>
<th>Agency</th>
<th>Member</th>
<th>First Alternate</th>
<th>Second Alternate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carlsbad</td>
<td>TBD</td>
<td>Marshall Plantz</td>
<td>Doug Bilse</td>
</tr>
<tr>
<td>Chula Vista</td>
<td>Frank Rivera**</td>
<td>Dave Kaplan</td>
<td>Bill Valle (Attended)/Rick Hopkins</td>
</tr>
<tr>
<td></td>
<td>(Attended)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coronado</td>
<td>Ed Walton (Attended)</td>
<td>Jim Newton</td>
<td></td>
</tr>
<tr>
<td>Del Mar</td>
<td>Tim Thiele</td>
<td>Eric Minicilli</td>
<td></td>
</tr>
<tr>
<td>El Cajon</td>
<td>Michael Griffiths</td>
<td>Mario Sanchez*</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Attended)</td>
<td></td>
</tr>
<tr>
<td>Encinitas</td>
<td>Ed Deane</td>
<td>Kipp Hefner</td>
<td></td>
</tr>
<tr>
<td>Escondido</td>
<td>Julie Procopio</td>
<td>Ed Domingue</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Attended)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Imperial Beach</td>
<td>Hank Levien</td>
<td></td>
<td></td>
</tr>
<tr>
<td>La Mesa</td>
<td>Greg Humora</td>
<td>Kathy Feilen</td>
<td>Dirk Epperson/ Dann Marquardt</td>
</tr>
<tr>
<td>Lemon Grove</td>
<td>Leon Firsh</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metropolitan Transit System</td>
<td>Mark Thomsen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National City</td>
<td>Stephen Manganiello</td>
<td>Kuna Muthusamy</td>
<td></td>
</tr>
<tr>
<td>North County Transit District</td>
<td>Bridget Hennessey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oceanside</td>
<td>Gary Kellison</td>
<td>David DiPierro</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Attended)</td>
<td></td>
</tr>
<tr>
<td>Poway</td>
<td>Steve Crosby</td>
<td>Melody Rocco</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Attended)</td>
<td></td>
</tr>
<tr>
<td>San Diego City</td>
<td>Linda Marabian</td>
<td>Gary Chui</td>
<td>Abi Palaseyed</td>
</tr>
<tr>
<td></td>
<td>(Attended)/ Gary Pence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Diego County</td>
<td>Mohamad Fakhrriddine</td>
<td>Terry Rayback</td>
<td></td>
</tr>
<tr>
<td>San Marcos</td>
<td>Matt Little (Attended)</td>
<td>Paul Vo</td>
<td></td>
</tr>
<tr>
<td>Santee</td>
<td>Minjie Mei (Attended)</td>
<td>Pedro Orso-Delgado</td>
<td></td>
</tr>
<tr>
<td>Solana Beach</td>
<td>Mohammad Sammak</td>
<td>Dan Goldberg</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Attended)</td>
<td></td>
</tr>
<tr>
<td>Vista</td>
<td>Greg Mayer</td>
<td>Tim Shell</td>
<td>Husam Hasenin</td>
</tr>
</tbody>
</table>

* Chair, Term Jan. 2014 – Dec. 2015  
** Vice-Chair, Term Jan. 2014 – Dec. 2015
Introduction

The 2050 Regional Transportation Plan and its Sustainable Communities Strategy, adopted by the SANDAG Board of Directors in October 2011, calls for the development of a comprehensive regional Complete Streets Policy. Over the past two years, staff has been working with the relevant SANDAG working groups to develop an understanding of what role SANDAG can play in supporting Complete Streets development in the San Diego region. As part of that process, SANDAG developed a Complete Streets discussion paper that was used to engage stakeholders at local agencies and the public on the topic. The paper also was presented to the SANDAG Board of Directors in June 2014.

Based on the feedback received from stakeholders, and on the direction provided by the Board of Directors, staff drafted a Regional Complete Streets Policy (Attachment 1.) The policy defines what Complete Streets means to SANDAG in its role as an implementer of transportation projects in the region, and as the regional planning agency that programs transportation funds, sets long-range regional transportation policy, and provides technical assistance and support to local agencies. This report presents the draft policy for discussion and recommendation for action by the Transportation Committee.

Discussion

The draft Complete Streets Policy includes a purpose statement and seven sections, each briefly described below.

Purpose. The policy supports the regional policy framework for smart growth and sustainability and applies to all users and uses of the transportation as is appropriate in each context.

Policy Statement. This statement establishes the goal of a safe and balanced multimodal system that SANDAG will achieve through its project development process and through incentives and assistance to local agencies.

Applicability. The policy applies to all phases of all projects developed by SANDAG, and to the administration of the TransNet Ordinance routine accommodation provision. Implementing the policy also means supporting and encouraging local General Plan’s that commit to Complete Streets principles or the adoption of stand-alone polices.
Design Practices and Context Sensitivity. This section encourages a flexible approach to street design that responds to its context and utilizes innovative design solutions when necessary to meet everyone’s needs.

Regional Network Principles. Effective Complete Streets policies provide an interconnected network of travel options that enables people traveling by all modes to comfortably and conveniently reach their destinations. The draft policy establishes a commitment by SANDAG to achieve this objective, taking into account both current and projected demand.

Performance Measures. Measuring outcomes is an important step in any process to determine its effectiveness. The draft policy proposes performance measures and objectives that will enable the periodic evaluation of the policy.

Exceptions. Every good Complete Streets policy recognizes that there are circumstances where accommodating all modes of travel is prohibited, unjustifiably expensive, or unwarranted. The draft policy describes those circumstances in general terms and establishes a process for approving exceptions.

Implementation. The draft policy includes eight implementation items that will guide the actions of SANDAG staff, ensure coordination with local and state agency Complete Streets efforts, provide training in Complete Streets practices and to establish a monitoring process.

Next Steps

The draft Regional Complete Streets Policy has been presented to the Regional Planning Technical Working Group (TWG), Regional Traffic Engineers Council, Active Transportation Working Group, and the Public Health Stakeholders Group for review and comments. The TWG recommended approval of the draft policy. Comments received are reflected in the draft policy presented here that will be brought to the SANDAG Transportation Committee and Regional Planning Committee in November for their recommendation to the Board of Directors. With their recommendations the draft Regional Complete Streets Policy will be presented to the SANDAG Board of Directors for approval in December. Once approved, the policy will be included as an appendix in San Diego Forward: The Regional Plan and work will begin on the implementation items.

Attachment: 1. Draft Board Policy No. 037, Complete Streets Policy

Key Staff Contact: Stephan Vance, (619) 699-1924, stephan.vance@sandag.org
DRAFT REGIONAL COMPLETE STREETS POLICY

Introduction
SANDAG guides regional planning via a policy framework based on smart growth and sustainability. Under this framework, much of the region’s future development will occur within the existing urbanized area and in compact, mixed-use neighborhoods that provide a variety of housing and transportation choices and help create healthier communities. Complete Streets is an important planning concept in this policy framework because it is a process for ensuring the transportation system is safe, useful, and attractive for all users of the transportation network – motorists, pedestrians, bicyclists, transit users, and freight carriers alike. Complete Streets provides valuable flexibility in street design so that the transportation system is appropriate for the current and planned built environment context.

1. Policy Statement
SANDAG seeks to fulfill the regional goal of a safe, balanced, multimodal transportation system that supports compact and sustainable development by adopting a Complete Streets approach in its project development and implementation processes, and by assisting and encouraging local jurisdictions to follow Complete Streets policies and practices. In this way, everyone will be able to safely travel along and across streets and railways to reach destinations within the region, regardless of age, ability, or mode of travel.

2. Applicability
Applicable principles in this Complete Streets Policy should be incorporated into the development of all SANDAG transportation infrastructure projects¹ across the region at all phases of development, including planning and land use decisions, scoping, design, implementation, and performance monitoring. SANDAG will incorporate Complete Streets principles into the development process for all projects in its Capital Improvement Program as appropriate for the project type.

All state, regional, and local agency projects included in the SANDAG programming document known as the Regional Transportation Improvement Program (RTIP) should be subject to applicable Complete Streets principles. RTIP projects submitted by SANDAG will incorporate Complete Streets principles and SANDAG encourages each entity submitting projects to the RTIP to implement a process that allows for public participation and comment on whether those projects follow Complete Streets principles.

In addition to applying this policy to projects in the RTIP, SANDAG supports and encourages Complete Streets implementation on other projects throughout the region. Local jurisdictions, as required by the California Complete Streets Act of 2008, will incorporate Complete Streets into their general plans as they revise their circulation elements. SANDAG encourages local agencies to implement Complete Streets principles if a circulation element revision is not planned in the near future. Adopting a Complete Streets approach provides an opportunity to establish more detailed direction on Complete Streets implementation than would be provided in the context of a general plan. SANDAG also encourages and supports Complete Streets methodologies in the design and

¹ The policy will apply to all new projects and projects still in the planning phase at the time the policy is adopted.
construction of all projects in the region developed by the California Department of Transportation (Caltrans) as appropriate consistent with Deputy Directive 64-R1, and in the maintenance and operation of all state highway and public transit facilities.

Section 4(E)(3) of the TransNet Extension Ordinance requires all projects constructed under the Ordinance to routinely accommodate pedestrian and bicyclists and is therefore connected to Complete Streets planning. Rule #21 of SANDAG Board Policy No. 031 provides guidance for the implementation of that requirement. SANDAG will periodically evaluate the effectiveness of Rule #21 to ensure compliance with this provision and to ensure that the rule reflects current best practices in Complete Streets implementation.

3. Design Practices and Context Sensitivity

While every street should be planned, designed, built, operated, and maintained for all foreseeable users, there is no singular design standard for Complete Streets and few streets will have separate accommodations for every mode. Projects should be planned and designed to consider current and planned adjacent land uses and local transportation needs, and to incorporate the latest and best practice design guidance. Each project must be considered both separately and as part of a connected network to determine the level and type of treatment necessary for all foreseeable users.

In order to provide context sensitive solutions that respond to public input and the need to serve a variety of users, a flexible, balanced approach to project design that utilizes innovative design solutions may be considered provided that an adequate level of safety for all users is ensured. SANDAG will compile a library of best practice design guidance to facilitate this and make it available on its website.

SANDAG encourages local governments and Caltrans to coordinate Complete Streets implementation with broader livable communities planning and integration of land use with transportation. SANDAG will coordinate educational opportunities for jurisdictional technical staff on current design standards and will encourage and support the use of modern best practices in Complete Streets design.

4. Regional Network Principles

A well-connected network provides safe and convenient transitions from one mode of transportation to another, from one jurisdiction to another, and from one type of infrastructure to another. A well-connected network also provides more route choices that can disperse traffic across the network, provides alternatives when priority is given to a particular mode along one route, and provides route alternatives when a link in the network is obstructed. SANDAG will endeavor to provide a continuous, uninterrupted regional network accessible to all users and modes. A well-connected network considers connectivity throughout the lifespan of a transportation project and takes into account the needs of both current and projected users.

5. Exceptions

All transportation projects constructed or reconstructed should be planned, designed, and constructed for all foreseeable users. For some projects, however, an exception to this standard may be warranted. For projects developed by SANDAG, project managers may propose an exception with supporting data to indicate the basis for the request. The request for an exception will be
reviewed by the project manager’s department director before inclusion and/or the next update of the project in the RTIP. Exceptions may be appropriate in the following cases:

- Where specific modes of travel are prohibited by law. In such cases, efforts should be made to accommodate travel by prohibited modes elsewhere, as appropriate for each mode, to ensure network connectivity. Where a proposed project for a limited access facility would cross a major barrier (such as a river, railroad, or highway), consideration should be given to the opportunity to include access across the barrier for otherwise limited modes.

- Where the cost of providing facilities for all travelers, especially pedestrians and bicyclists, would be excessively disproportionate to the need or likely use. Federal guidance defines this as exceeding 20 percent of the total project costs; however, this exception should also be context-sensitive. Where demand is high or a barrier is significant, a cost in excess of 20 percent may be warranted, but where demand is low, 20 percent may not. This exception must consider probable use through the life of the project, a minimum of 20 years.

- Where approved or adopted plans or policies (such as local land use, zoning, or mobility planning) or present and anticipated market conditions indicate an absence of need for both current and future conditions of the anticipated project’s life (a minimum of 20 years for roadways and 50 years for bridges).

- Where unmitigable detrimental environmental impacts outweigh the need for full accommodation of all travel modes. In making this determination, the needs of all modes will be considered, with priorities determined based on the project context.

Exceptions that are recommended for approval on SANDAG projects will be reported to the Transportation Committee through the RTIP process where a member of the public may either present opposition to that recommendation during public comment or in writing in advance of the meeting at which the exception recommendation is to be considered. Exceptions should not be common.

6. Performance Measures

SANDAG will evaluate the outcomes of this Complete Streets Policy in concert with regional performance measures, such as those developed for the Regional Plan and future long-range transportation plans. The policy will be subject to a biennial review of objective measures presented to the Transportation Committee for the committee to use in evaluating the effectiveness of the policy. These measures and their objectives include:

6.1 An increase in the number of projects that include multimodal connections to destinations by providing bicycle and pedestrian facilities, crossing improvements, traffic calming measures, wayfinding signs or other measures;

6.2 An increase in the miles of new and upgraded bikeways and walkways in the region, and other improvements that improve access for biking, walking, and transit or improve monitoring of those modes;

6.3 An increase in member jurisdictions that have adopted policies incorporating Complete Streets principles, or that have revised the circulation element of their general plans in compliance with the California Complete Streets Act;
6.4 The number of staff members from SANDAG and local jurisdictions and other transportation agencies participating in training and events that reflect best practices in Complete Streets planning and design; and

6.5 Progress in accomplishing activities identified in the “Implementation” section below.

7. **Implementation**

In addition to the measures described above in this policy, SANDAG will take the following actions in collaboration with member agencies and other affected agencies:

7.1 All projects developed by SANDAG are opportunities to improve access and mobility for all modes. Toward that end, SANDAG will create a project development checklist to ensure all projects implemented by SANDAG consider local mobility plans and accommodate the needs of all travel modes and the movement of goods to the extent appropriate. Use of the checklist will include coordination between departments and consultation with staff for all modes through participation on the project development team.

7.2 Develop a process for coordinating the development of regional projects with local agency Complete Streets initiatives and include in that process a protocol for evaluating cost sharing opportunities.

7.3 Develop a project development checklist template that local agencies can use to ensure local projects result in Complete Streets.

7.4 Collaborate with local jurisdictions, Caltrans, and transit operators to develop a regional database and mapping tool to facilitate coordinated development of local and regional Complete Streets plans.

7.5 Provide opportunities for SANDAG staff and staff from member agencies, Caltrans, and transit operators to participate in trainings, workshops, and other educational events related to Complete Streets procedures and practices, including but not limited to transportation safety, multimodal network planning, context-sensitive design, connecting transportation and land use decisions, and evaluating projects and the impact of transportation investments. This will be an ongoing activity to ensure practitioners are well informed about state of the art practices.

7.6 Develop tools and reference materials as needed, such as guidance on best practices and innovation in street design, parking management strategies, storm water best practices, incorporating bicycle and pedestrian access to transit stops and stations, traffic impact studies, and public engagement tools. SANDAG will make these tools available to other entities on its website.

7.7 Continue work on related initiatives that support multimodal connections, including the Safe Routes to School and Safe Routes to Transit programs.

7.8 Develop a benchmarking process for SANDAG project managers to use as a tool for monitoring implementation of this policy.
**TransNet SMART GROWTH INCENTIVE PROGRAM**  
AND **ACTIVE TRANSPORTATION GRANT PROGRAM:**  
CALL FOR PROJECTS FOR THIRD CYCLE OF GRANT FUNDING

**Introduction**

The *TransNet* Extension Ordinance provides funding for two SANDAG land use and transportation competitive grant programs – the Smart Growth Incentive Program (SGIP) and the Active Transportation Grant Program (ATGP). To date, SANDAG has issued two cycles of funding for each program, and traditionally the calls for projects for the programs have been issued independently. Due to the similar program elements, staff is conducting the third call for projects for the two grant programs simultaneously.

The criteria for both programs underwent significant updates during the last grant cycle to ensure consistency with the 2050 Regional Transportation Plan/Sustainable Communities Strategy (2050 RTP/SCS) and *Riding to 2050: The San Diego Regional Bicycle Plan*. Information related to program guidelines, eligible projects, and scoring criteria for both programs (from the second cycle) is provided in Attachments 1 and 2.

No changes to the scoring criteria or program guidelines are recommended for the third cycle. Several changes were initially considered, but based on discussion with the Regional Planning Technical Working Group (TWG), Cities/County Transportation Advisory Committee (CTAC), Active Transportation Working Group (ATWG), and Independent Taxpayer Oversight Committee (ITOC) at their June and July 2014 meetings (summarized in Attachment 3), changes to the scoring criteria are not recommended. However, since initial discussions with the working groups and ITOC last summer, staff has begun to consider whether there may be an opportunity to raise the cap on the SGIP capital grants from the current cap of $2 million to $3 million or $4 million given the proposed three-year funding cycle, the higher amount of *TransNet* funds estimated to be available during this funding cycle ($12 million versus $9.6 million), and the continued impacts on local jurisdictions from the loss of redevelopment funds. (Given the smaller amount of funding available for the ATGP, no changes are proposed to the ATGP funding cap.)

---

1The ATGP is referred to as the “Bicycle, Pedestrian and Neighborhood Safety Program” in the *TransNet* Extension Ordinance.
The Committee is asked to discuss any potential additional modifications, including whether to raise the funding cap on the SGIP. Pending the Committee’s direction, staff also will solicit input from the TWG and CTAC on this concept at their November meetings and report back to the Committee next month.

This item will be presented to the Transportation Committee on November 14, 2014, for additional input, and brought back to both the Regional Planning and Transportation Committees for recommendation to the SANDAG Board next month.

Discussion

**Eligibility, Available Funding, and Program Objectives**

The *TransNet* Extension Ordinance sets aside 2 percent of annual *TransNet* sales tax revenues each for the SGIP and for the ATGP. The ATGP is supplemented with Transportation Development Act (TDA) revenues. Only local cities and the County of San Diego can apply for grant funds. Nonprofit and community-based organizations may collaborate to apply for funding in conjunction with the cities or the County, but cannot apply directly for the funds.

Approximately $12 million for the SGIP and $3 million^2 for the ATGP will be available for this grant cycle (reflecting anticipated funding for FY 2014 through FY 2016), pending Board of Directors’ approval of the SANDAG FY 2016 Program Budget in May 2015. The SANDAG Board is anticipated to issue the call for projects for both programs in December 2014 and approve the project awards in summer 2015.

The following table provides a summary of goals, program objectives, and grant types from the most recent grant cycle for each program.

<table>
<thead>
<tr>
<th></th>
<th>SGIP</th>
<th>ATGP</th>
</tr>
</thead>
</table>
| **Goals**            | • Encourage comprehensive public infrastructure projects and planning activities that facilitate compact, mixed-use development focused around public transit, and that aim to increase housing and transportation choices  
                                               • Fund projects that can serve as models and attract private development  
                                               • Create great places in the San Diego region | • Encourage the planning and development of Complete Streets, and provide multiple travel choices for the region’s residents  
                                               • Fund bicycle and pedestrian-oriented transportation facility improvements, planning efforts, encouragement and education programs, and bicycle parking  
                                               • Support the goals and objectives of *Riding to 2050: The San Diego Regional Bicycle Plan* |

---

^2 When the SANDAG Board approved the Regional Bike Early Action Program (EAP) in September 2013, it limited the ATGP to $1 million per year.
### Program Objectives

- Serve as catalysts for further smart growth development
- Influence land development by improving the public realm and encouraging private projects that create great places
- Serve as model examples for smart growth in a variety of settings
- Contribute to the reduction of Greenhouse Gas (GHG) emissions by encouraging travel means other than single-occupant vehicle
- Support future housing development
- Encourage a cohesive network of complete streets, improve bike/pedestrian neighborhood connectivity to transit and destinations such as schools, retail, places of work, parks, and other gathering places, and support smart growth place-making
- Improve safety for bicyclists and pedestrians
- Serve as models for the region by featuring innovative solutions that prioritize access for bicyclists and pedestrians
- Ensure access to jobs, services, and recreation for populations with fewer transportation choices, and create equitable transportation opportunities for all users, regardless of age, ability, race, ethnicity, or income
- Increase community support for bicycling and walking and promote active transportation as a means of improving health outcomes
- Support reductions in GHG emissions and facilitate an increase in levels of walking and bicycling in the region by providing supportive facilities, amenities, and programs

### Grant Types and Percentage Allocations

<table>
<thead>
<tr>
<th>SGIP</th>
<th>ATGP</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Capital (80 percent; $2 million cap)</td>
<td>• Capital (75 percent with $500,000 threshold for large projects; 60 percent maximum toward large projects; $1.5 million cap)</td>
</tr>
<tr>
<td>• Planning (20 percent plus any rollover from Capital; $400,000 cap)</td>
<td>• Non-Capital (25 percent plus any rollover from Capital; varying funding caps)</td>
</tr>
<tr>
<td>o Planning (15 percent)</td>
<td>o Planning (15 percent)</td>
</tr>
<tr>
<td>o Education/Encouragement/Awareness (5 percent)</td>
<td>o Education/Encouragement/Awareness (5 percent)</td>
</tr>
<tr>
<td>o Bicycle parking (5 percent)</td>
<td>o Bicycle parking (5 percent)</td>
</tr>
</tbody>
</table>

### Summary of Previous Funding Cycles

The following table provides information for the first two cycles of both grant programs, and provides estimated dates and funding amounts for the third cycle.

<table>
<thead>
<tr>
<th>SGIP</th>
<th>Release of Call for Projects</th>
<th>Projects Awarded</th>
<th>Fiscal Years</th>
<th>Available Funding</th>
<th>Number of Projects Funded</th>
</tr>
</thead>
</table>
## ATGP

<table>
<thead>
<tr>
<th>ATGP</th>
<th>Release of Call for Projects</th>
<th>Projects Awarded</th>
<th>Fiscal Years</th>
<th>Available Funding</th>
<th>Number of Projects Funded</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Cycle</td>
<td>April 2009</td>
<td>June 2009</td>
<td>FY 2010$^3$</td>
<td>$7.8 million</td>
<td>31 projects</td>
</tr>
<tr>
<td>Second Cycle</td>
<td>April 2012</td>
<td>Sept 2012</td>
<td>FY 2011, FY 2012$^4$</td>
<td>$8.8 million</td>
<td>25 projects</td>
</tr>
</tbody>
</table>

### Other Considerations

#### Project Readiness and Past Performance

At previous meetings, the Policy Advisory Committees and ITOC have expressed concern over the number of grant amendments being requested by grantees and have suggested that future SGIP and ATGP calls for projects should consider strengthening the criteria related to project readiness and/or adding criteria regarding past performance.

Regarding project readiness, staff conducted an internal analysis of project readiness scores in relation to requests for amendments during the first cycle to assist in determining whether project readiness was a factor in project delays and/or amendment requests. The analysis found no correlation, with some projects that received high project readiness scores having one or more amendment requests, and some projects that received low project readiness scores requesting no amendments. As such, staff is not proposing any changes to the current criteria related to project readiness.

Regarding past performance, staff is establishing a more formalized process for site visits with grantees to improve performance over the course of grant implementation. Successful grant implementation is a collaborative effort between SANDAG and the local jurisdictions. Many of the projects funded under the grant programs are new and innovative, and inherently include a certain amount of unknowns, such as the elimination of redevelopment agencies and issues related to utility easements and facilities, over which local jurisdictions have little control. Within this context, improvements in project implementation to avoid project delays and reduce the number of amendments can be achieved by working more closely with the grantees and undertaking site visits when certain milestones are not being met.

---

$^3$ No TransNet funds from FY 2009 were used in the first ATGP cycle. The first cycle was supplemented by TDA funds.

$^4$ No TransNet funds from FY 2013 were used in the second ATGP cycle. FY 2013 and a portion of FY 2014 TransNet funds were used to fund the Inland Rail Trail as part of the Regional Bike EAP.
Schedule and Next Steps

The following schedule is anticipated for the third grant cycle.

• Summer/Fall 2014: Prepare call for projects (and update Smart Growth Concept Map\(^5\))

• December 2014: Regional Planning and Transportation Committees recommend release of the call for projects; SANDAG Board releases call for projects for both programs

• March 20, 2015: Applications due

• Spring/Summer 2015: Evaluations, project rankings, and review/recommendations by Regional Planning and Transportation Committees

• Summer 2015: SANDAG Board approves projects

• December 2015: Grant agreements executed and jurisdictions begin work

CHARLES “MUGGS” STOLL
Director of Land Use and Transportation Planning

Attachments: 1. TransNet Smart Growth Incentive Program (SGIP): Eligible Projects, Scoring Criteria Guidance, and Scoring Criteria Matrix
   a. Capital Grants
   b. Planning Grants

2. TransNet Active Transportation Grant Program (ATGP): Eligible Projects, Scoring Criteria Guidance, and Scoring Criteria Matrix
   a. Capital Grants
   b. Non-Capital Grants

3. Initially-Proposed Changes to SGIP and ATGP Program Guidelines

Key Staff Contact: Carolina Gregor, (619) 699-1989, carolina.gregor@sandag.org

\(^5\) The SANDAG Board accepted the 2014 Technical Update of the Smart Growth Concept Map on October 24, 2014.
SGIP ELIGIBLE PROJECTS (Capital Grants)

Eligible capital grant projects include pedestrian improvements, bicycle facilities, transit access improvements, and other innovative smart growth-supporting infrastructure. Proposed capital SGIP projects may include, but are not limited to, the following eligible elements.

- Public Plazas
- Pedestrian Street Crossings
- Streetscape Improvements (such as, median landscaping, street trees, lighting, and street furniture)
- Parklets
- Traffic Calming Features (such as, pedestrian bulb-outs or traffic circles)
- Access Improvements to Transit Stations/ Routes
- Wayfinding Signage
- Community Gateway Features
- Pedestrian and Bicycle Paths and Bridges
- On Street Bike Lines
- Bicycle Parking
- Low Impact Development Elements Included as Part of the Above

Applicants are encouraged to utilize innovative solutions that are new to the region, and that are comprehensive in scope.
HOW WILL PROJECTS BE SCORED?

Once a project has been deemed eligible, it will be scored based on the criteria for its project type. Because the planning activities and capital improvements are very different, each will be scored under its own set of criteria. The project scoring criteria for capital projects are discussed in detail below.

1. LAND USE AND TRANSPORTATION CHARACTERISTICS

The following criteria will determine competitiveness of the location of the proposed grant project, in terms of the project area’s land use and transportation characteristics at present, and in the near-term future.

Land use and transportation characteristics will be scored by SANDAG staff using current SANDAG land use and transportation data. Planned densities and land uses must be in adopted general plans and/or community plans. Pending amendments will not be considered. It is the responsibility of local jurisdictions to ensure that SANDAG has current land use data, and to submit information regarding entitled development within the project area.

A. Intensity of Planned Development in Project’s SGOA

A1. Planned Densities Relative to SGOA Place Type Thresholds

Up to six points are available. This criterion will be scored by SANDAG, comparing PLANNED land use densities for the project area to the density thresholds prescribed for the project’s smart growth opportunity area place type. Densities will be based on the land use designations in SANDAG’s currently adopted regional growth forecast.

Projects in areas with planned residential and/or employment densities that exceed the minimum density threshold for its smart growth place type will score highest in this category.

A2. Expedited Approval Process

A total of four points are available, if an applicant can demonstrate that a specific plan, master Environmental Impact Report, or other mechanism is in place to allow for administrative approval of development projects. This criterion will be scored by SANDAG.

B. EXISTINGS AND ENTITLED LAND DEVELOPMENT IN THE PROPOSED CAPITAL PROJECT AREA

B1. EXISTING Development Density

Up to six points are available. EXISTING development density around the proposed capital project will be calculated by SANDAG, comparing EXISTING densities within 1/4-mile of the project to the density thresholds prescribed for the project’s smart growth opportunity area place type. The 1/4-mile area around a project will extend for the full length of linear projects. Project areas where residential and/or employment development exceeds the minimum density threshold for its smart growth place type will score the highest in this category.

B2. ENTITLED Development Density

Up to six points are available. ENTITLED development projects within a 1/4-mile radius of the proposed capital project will qualify if any portion of the development project boundary is within the 1/4-mile area surrounding the proposed capital project. Densities will be scored relative to minimum threshold for the area’s smart growth place type. To receive points, applicant must describe entitled developments in the application. This criterion will be scored by SANDAG.

B3. Mix of Uses

Up to three points are available. Mix of Uses will be calculated by SANDAG by counting the number of current uses in the project area. Multi-family residential does not count toward these points; it must exist within the project area in addition to the other uses in order to earn points (i.e. projects without multi-family residential within 1/4 mile of the project area will not receive any points). The categories of land uses counted include single-family residential, retail, office, civic, parks, and visitor-serving.
B4. New Uses

A total of two points are available. The applicant must provide evidence of any new uses that would be added to the project area as a result of land development that the proposed capital project would support.

C. NEW AFFORDABLE HOUSING DEVELOPMENT

C1. New Affordable Housing Development

Up to 3 points are available. The applicant will identify new affordable housing that will be produced in conjunction with the entitled land development within 1/4-mile of the project. “Affordable housing” means housing that serves extremely low, very low, or low income households (between zero to 80 percent of area median income adjusted for household size). Affordable housing costs are defined in Section 6918 for renters and Section 6920 for purchasers of Title 25 of the California Code of Regulations, and in Sections 50052.5 and 50053 of the Health and Safety Code, or by the applicable funding source or program. Acquired and rehabilitated affordable housing qualifies under this criterion. This criterion will be scored by SANDAG.

C2. Low to Very-Low Income Affordable Units

A total of two points are available, if 50-100 percent of units in the development are restricted to low to very-low income residents.

D. TRANSPORTATION CHARACTERISTICS OF THE PROJECT AREA

SANDAG staff will score these criteria based on the transportation facilities within 1/4-mile walking distance of the project boundary. Walking distance will be determined through geographic system information transit and bicycle networks, and network of actual available walking paths.

D1. Relation to Transit

Up to 12 points are available. Transit facilities must be either existing or funded for construction to qualify.

D2. Bicycle Facilities

Up to two points are available. Bicycle facilities will be identified by the current San Diego Regional Bike Map unless the applicant provides additional information about existing or planned bike facilities not on the current map.

Only bicycle facilities built consistent with California Highway Design, Chapter 1000 standards will qualify. One point will be awarded where bicycle facilities exist within a 1/4 mile of the proposed project, and two points when those facilities connect directly to the project.

D3. Walkability

Up to four points are available. Walkability will be determined by the intersection density of the street network in the project area based on the following scale:

<table>
<thead>
<tr>
<th>Intersection Density (per Square Mile)</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>290 or greater</td>
<td>4</td>
</tr>
<tr>
<td>225-290</td>
<td>3</td>
</tr>
<tr>
<td>100-224</td>
<td>2</td>
</tr>
<tr>
<td>Less than 100</td>
<td>1</td>
</tr>
</tbody>
</table>
D4. Transportation Demand Management Strategies

Up to two points are available. Transportation Demand Management (TDM) strategies within the project area must be described in the project application.

Existing TDM programs within the project area, such as requiring TDM plans as part of the development review process, or parking management strategies such as shared parking or allowing reductions in parking requirements receive two points, and proposed programs or policies receive one point.

Examples of TDM policies and programs that can be considered for this points category are included in (but not limited to those found in) *Integrating TDM into the Planning and Development Process*, which can be found at www.sandag.org/smartgrowth.

E. COMMUNITY DESIGN FEATURES AND CONTEXT OF THE PROJECT AREA

E1. Urban Design Characteristics and Community Context

Up to six points are available. This criterion will be scored by the panel, using aerial imagery, Google Street View and/or site visits, and guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 3 – Consistent Street Edge (for large developments)
- Smart Growth Scorecard 4 – Street Frontages
- Connectivity (3.4 in Chapter 3 Site Design)
- Site Access (3.3 in Chapter 3 Site Design)
- Building Frontage (4.1 in Chapter 4 Building Design)
- Parking (Chapter 9 Parking)

The highest scoring projects will be located in project areas that exemplify the principles in all or a majority of the above sections. Lower scoring projects will be located in project areas that minimally exemplify principles in only one or a few of the above sections. Panel members will be provided with the above sections from *Designing for Smart Growth*.

Points are also available under this criterion if the local jurisdiction has developed design guidance for the project area that is in line with the above principles, such as:

- Design guidelines
- Form-based codes
- Renderings of proposed development

2. QUALITY OF PROPOSED CAPITAL IMPROVEMENT PROJECT

The following criteria will determine competitiveness of the actual proposed grant project, in terms of how well the project meets the objectives of this grant program.

A. Support for Public Transit

Up to five points are available. This criterion will be scored by the panel, using guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 10 – Transit Access (for streetscapes)
- Chapter 5 – Multimodal Streets – in terms of guidance for stops and stations, as well as bicycle and pedestrian access to transit
- Chapter 6 – Transit Stations

The highest scoring projects will propose elements that exemplify the principles in all or a majority of the above sections. Lower scoring projects will include minimal elements that exemplify principles in only one or a few of the above sections. Panel members will be provided with the above sections from *Designing for Smart Growth*. 


B. Providing Transportation Choices

Up to five points are available. This criterion will be scored by the panel, using guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 8 – Street Connectivity (for streetscapes)
- Smart Growth Scorecard 9 – Pedestrian Realm
- Smart Growth Scorecard 13 – Vehicle and Bicycle Parking (for streetscapes)
- Smart Growth Scorecard 14 – Parking Demand Management (for streetscapes)
- Chapter 5 – Multimodal Streets

The highest scoring projects will propose elements that exemplify the principles in all or a majority of the above sections. Lower scoring projects will include minimal elements that exemplify principles in only one or a few of the above sections. Panel members will be provided with the above sections from *Designing for Smart Growth*.

Additionally:

- Pedestrian facility design must be consistent with the recommendations in the SANDAG Planning and Designing for Pedestrians, should improve street crossings where necessary, and/or connect the community and its activity centers.
- Bicycle facilities should be designed consistent with the requirements of Chapter 1000 of the California Highway Design manual, or the California MUTCD. Projects may also use AASHTO standards. Bicycle parking should be designed consistent with the bicycle parking guidelines in the San Diego Regional Bicycle Plan. Highest scoring projects will provide continuity with bike routes beyond the immediate project area and connect to important community destinations, especially public transit.
- Projects that do not directly facilitate travel, such as public gathering areas should contribute to reducing vehicle travel by bringing needed public places into walking or bicycling range of community members.
- Changes to vehicle parking should significantly reduce the role of the automobile for travel in the area as well as the impact of parking on the community design of the area.

C. Community Enhancement

Up to five points are available. This criterion will be scored by the panel, using guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 12 – Plazas and Seating
- Neighborhood Context (3.2 in Chapter 3 Site Design)
- Chapter 8 – Parks and Civic Space

The highest scoring projects will propose elements that exemplify the principles in all or a majority of the above sections, and contribute toward a setting that is more likely to attract private investment. Lower scoring projects will include minimal elements that exemplify principles in only one or a few of the above sections, and lack features that would help to accomplish the goal of placemaking. Panel members will be provided with the above sections from *Designing for Smart Growth*.

D. Addressing Project Area Issues

Up to five points are available. This criterion will assess how well the project addresses issues specific to the community, which will be unique in each location, depending on demographics and specific needs; and how well the project preserves and integrates existing cultural and natural resources in the project area.

Specific issues to be addressed may pertain to specific populations such as the elderly or disabled or other low-mobility populations, or may address area issues such as crime, or work toward a goal of economic revitalization for existing businesses.
In the example of specific populations, the proposed project could reduce roadway speeds and employ other traffic calming improvements that will ensure safer access for elderly residents from a residential street to a senior center or retail district around the corner.

In the example of crime, the proposed project could seek to improve public safety by employing crime prevention through environmental design strategies, cleaning up an eyesore, or removing a nuisance that attracts crime.

The applicant should demonstrate how the project will effectively integrate and preserve existing cultural and natural resources in the area that help shape the identity of that community. Natural resources could include (but are not limited to) creeks and open space.

Cultural resources could range from (but are not limited to) locally owned small businesses, murals, memorials and monuments, and historical buildings, bridges, or other infrastructure that represent landmarks in the community.

Highest scoring projects will address area issues comprehensively and effectively, and with design features that artfully integrate community resources into the project. Capital projects should preserve and protect important cultural and natural resources in the project area, and when appropriate, integrate such resources into the project design.

Smart Growth Scorecard 5 – Historic and Natural Features from *Designing for Smart Growth* will also be used to score this criterion.

**E. Sustainability**

Up to two points are available. This criterion will be scored by the panel, using guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 6 – Sustainable Design (for streetscapes)
- Energy Conservation and Landscaping (3.5 in Chapter 3 Site Design)
- Stormwater Runoff (5.5 in Chapter 5 Multimodal Streets)

The highest scoring projects will propose elements that exemplify the principles in all or a majority of the above sections. Lower scoring projects will include minimal elements that exemplify principles in only one or a few of the above sections. Panel members will be provided with the above sections from *Designing for Smart Growth*.

**F. Universal Design**

Up to two points are available. This criterion will be scored by the panel, using guidance from the following sections in *Designing for Smart Growth: Creating Great Places in the San Diego Region*:

- Smart Growth Scorecard 7 – Universal Access
- Universal Design (6.2 in Chapter 6 Transit Stations)

Additionally, intersection improvements must include pedestrian signals and detectable warnings designed for pedestrians with visual and hearing impairments.

The highest scoring projects will propose elements that exemplify the principles of universal design. Lower scoring projects will include minimal elements that exemplify principles in only one or a few of the above sections. Projects that only meet Public Rights-of-Way Accessibility Guidelines will not receive points. Panel members will be provided with the above sections from *Designing for Smart Growth*.

For more information and resources on universal design principles, please visit:

- [http://design.ncsu.edu/cud/](http://design.ncsu.edu/cud/)
- [http://www.access-board.gov/prowac/](http://www.access-board.gov/prowac/)
3. **PROJECT READINESS**

A. **Major Milestones Completed**

Up to four points are available. SANDAG will score projects based on the project development milestones completed.

- Environmental clearance under California Environmental Quality Act and the National Environmental Policy Act if appropriate is worth one point.
- Completion of right-of-way acquisition, all necessary entitlements, or evidence provided by the applicant that no right-of-way acquisition is required, earns one point.
- Completion of final design (plans, specifications, and estimates) also earns one point.
- One point will be awarded if the applicant can provide evidence that the project is fully funded, OR the grant will fully fund the project.

B. **Evidence of Local Commitment**

Up to two points are available. The applicant should demonstrate that the project is supported by the community, as a result of a comprehensive public participation process that significantly involved a diverse group of stakeholders.

Projects that can provide evidence of a comprehensive, community-based planning process leading to the project and endorsement of community groups will be awarded two points.

Projects that cannot demonstrate that their planning process involved a diverse group of community stakeholders and that the project has the support of some, but not most community groups will receive one point.

Evidence of opposition from individuals within the community will not reduce the points awarded unless there is an ad hoc organization of opposition, or the number of individuals in opposition is significant.

4. **Grant-Score Ratio**

Up to 16 points are available. The grant-score ratio is scored by dividing the sum of the weighted points earned on the criteria in categories I and II by the grant request. The projects will be ranked based on the resulting ratio and the available 16 points will be distributed proportionately. The project(s) with the highest ratio receives 16 points, and the one(s) with the lowest receives one point.

5. **Matching Funds**

Up to ten points are available. Points for matching funds are awarded by dividing the total project cost as proposed in the application by the grant request. The projects will be ranked based on the resulting ratio and the available ten points distributed proportionately. The project(s) with the highest ratio receives ten points, and those with the lowest receive one point.

6. **SANDAG Board Policy No 033 Points for Affordable Housing Production**

Up to 75 points are available. See Board Policy No.033 for detailed methodology.
### SGIP SCORING CRITERIA MATRIX (Capital Grants)

<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>LAND USE AND TRANSPORTATION CHARACTERISTICS OF THE AREA AROUND THE PROPOSED CAPITAL PROJECT IMPROVEMENT</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### A. Intensity of Planned Development in the Project’s SGOA

<table>
<thead>
<tr>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
</table>
| 3   | **For Metropolitan Center/Urban Centers/Town Centers**
|     | Exceeds minimum residential requirements by 100 percent or more | Up to 6 | 1 | 6 | 2% |
| 2   | Exceeds minimum residential requirements by 50-99 percent | | | | |
| 1   | Exceeds minimum residential requirements by 25-49 percent AND | | | | |
| 3   | Exceeds minimum employment requirements by 100 percent or more | | | | |
| 2   | Exceeds minimum employment requirements by 50-99 percent | | | | |
| 1   | Exceeds minimum employment requirements by 25-49 percent OR **For community Centers/Rural Village/Mixed-Use Transit Corridor** | | | | |
| 6   | Exceeds minimum residential requirements by 100 percent or more | | | | |
| 4   | Exceeds minimum residential requirements by 50-99 percent | | | | |
| 2   | Exceeds minimum residential requirements by 25-49 percent | | | | |

#### B. EXISTING and ENTITLED Land Development Around the Proposed Capital Project

<table>
<thead>
<tr>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
</table>
| 3   | **For Metropolitan Center/Urban Centers/Town Centers**
<p>|     | Exceeds minimum residential requirements by 100 percent or more | Up to 6 | 1 | 6 | 2% |
| 2   | Exceeds minimum residential requirements by 50-99 percent | | | | |
| 1   | Exceeds minimum residential requirements by 25-49 percent AND | | | | |
| 3   | Exceeds minimum employment requirements by 100 percent or more | | | | |
| 2   | Exceeds minimum employment requirements by 50-99 percent | | | | |
| 1   | Exceeds minimum employment requirements by 25-49 percent OR <strong>For community Centers/Rural Village/Mixed-Use Transit Corridor</strong> | | | | |
| 6   | Exceeds minimum residential requirements by 100 percent or more | | | | |
| 4   | Exceeds minimum residential requirements by 50-99 percent | | | | |
| 2   | Exceeds minimum residential requirements by 25-49 percent | | | | |</p>
<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2.</td>
<td>EXISTING Development Density within 1/4 mile radius of proposed capital project site- IN THE PIPELINE</td>
<td>4</td>
<td>more</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Exceeds minimum residential requirements by 50-99 percent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B3.</td>
<td>Mix of Uses</td>
<td></td>
<td>(Single-family residential, retail, office, civic, parks, visitor within 1/4 mile of project site)</td>
<td>Up to 3</td>
<td>2</td>
<td>6</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>Multi-family residential + 6 other uses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Multi-family residential + 4-5 other uses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>Multi-family residential + 2-3 other uses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B4.</td>
<td>New Use</td>
<td>2</td>
<td>New use will be added to the project area</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

### C. New Affordable Housing Development

<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1.</td>
<td>New Affordable Housing</td>
<td></td>
<td>Percent of income-restricted affordable housing provided in proposed new development (within 1/4 mile of project site)</td>
<td>Up to 3</td>
<td>2</td>
<td>6</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>100 percent of units affordable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>99-75 percent of units affordable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>74-25 percent of units affordable</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C2.</td>
<td>Low to very-low income affordable units</td>
<td>2</td>
<td>50-100 percent of units in the development are restricted to low to very-low income residents</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

### D. Transportation Characteristics (Within walking and biking distance of proposed capital project)

<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>PTS</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT</th>
<th>SCORE POSSIBLE</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>D1.</td>
<td>Relation to Transit</td>
<td></td>
<td>Scale of actual walking distance to existing or programmed station or transit hub:</td>
<td>Up to 12</td>
<td>1</td>
<td>12</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12</td>
<td>Regional or Corridor station or a Transit Center- Project abuts or is onsite</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>10</td>
<td>Project is within 1/2 mile</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Transit hub- Project is within 1/4 mile</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6</td>
<td>Stop with high frequency local bus service (15 minutes All day)- Project is within 1/4 mile</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2.</td>
<td>Bicycle Facilities</td>
<td></td>
<td>EXISTING bicycle lanes, bike boulevards, cycle tracks, or separated bike paths (Class I), or PLANNED bicycle lanes, bike boulevards, cycle tracks, or separated bike paths (Class I) (as identified in San Diego Regional Bicycle Plan or local bicycle master plan)</td>
<td>Up to 2</td>
<td>2</td>
<td>4</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>Direct connection to proposed project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>Facilities within 1/4 mile radius of project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D3.</td>
<td>Walkability</td>
<td></td>
<td>Intersection Density per square mile:</td>
<td>Up to 4</td>
<td>2</td>
<td>8</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>290 or greater</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>225-289</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>100-224</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>Less than 100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D4.</td>
<td>TDM Strategies</td>
<td>2</td>
<td>EXISTING TDM programs or policies in place</td>
<td>Up to 2</td>
<td>2</td>
<td>4</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>PROPOSED TDM programs or policies, including implementation strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NO.</td>
<td>CATEGORY</td>
<td>POINTS</td>
<td>CRITERIA</td>
<td>POINTS POSSIBLE</td>
<td>WEIGHT</td>
<td>SCORE POSSIBLE</td>
<td>%</td>
</tr>
<tr>
<td>-----</td>
<td>----------------------------------------------</td>
<td>--------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>------------------</td>
<td>--------</td>
<td>----------------</td>
<td>------</td>
</tr>
<tr>
<td>E.</td>
<td>Community Design Features</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| E1  | Urban Design Characteristics and Community Context | 6      | Design Characteristics of existing community, AND/OR proposed design characteristics prescribed by documented guidance for the area or jurisdiction through design guidelines, form-based codes, or renderings of proposed development; area will be assessed relative to the following sections in Design for Smart Growth:  
- Consistent Street Edge (Smart Growth Scorecard)  
- Street Frontages (Smart Growth Scorecard)  
- Connectivity (3.4 in Chapter 3 Site Design)  
- Site Access (3.3 in Chapter 3 Site Design)  
- Parking (Chapter 9 Parking)  
- Building Frontage (4.1 in Chapter 4 Building Design) | Up to 6 | 2     | 12                          | 4%  |
| 2.  | QUALITY OF PROPOSED CAPITAL IMPROVEMENT PROJECT | 30%    |                                                                                             |                  |        |                |      |
| A.  | Support for Public Transit                   | 5      | How well does the project support use of regional public transit service in the project area? | Up to 5          | 5     | 25             | 8%  |
| B.  | Providing Transportation Choices             | 5      | How well does the project support transportation choices that would reduce vehicle miles traveled, specifically walking and bicycling? | Up to 5          | 5     | 25             | 8%  |
| C.  | Community Enhancement                        | 5      | How well does the proposed project enhance the public realm in the project area, to engender support for smart growth, through place making and creating regional destinations? | Up to 5          | 4     | 20             | 7%  |
| D.  | Addressing Project Area Issues               | 5      | How well does the project address identified special needs and concerns of the community, such as improving access for elderly, disabled, low-mobility populations, or increasing public safety? How well does the project preserve and appropriately integrate cultural and natural resources in the project area? | Up to 5          | 3     | 15             | 5%  |
| E.  | Sustainability                               | 2      | How well does the proposed project incorporate Green Stress/Low-Impact Development principles, to address stormwater runoff, energy conservation, and landscaping/street trees? | Up to 2          | 1     | 2              | 1%  |
| F.  | Universal Design                             | 2      | How well does the project incorporate Universal Design principles, to ensure access for users of all ages and abilities? | Up to 2          | 1     | 2              | 1%  |
| 3.  | PROJECT READINESS                            | 11%    |                                                                                             |                  |        |                |      |
| A.  | Major Milestones Completed                   | 1      | Environmental Clearance  
- Right-of-way Acquisition  
- Final Design  
- Project Full Funded (matching funds secured OR grant will fully fund project) | Up to 4 | 5     | 20             | 7%  |
| B.  | Evidence of Local Commitment                 | 2      | Project is supported by the community, and is the result of a comprehensive, public participation process that significantly involved a diverse group of stakeholders | Up to 2          | 6     | 12             | 4%  |
| 4.  | COST EFFECTIVENESS                           | 5%     |                                                                                             |                  |        |                |      |
| A.  | Ratio of grant request to project score      |        | Project grant request, divided by score up to this point; ranked relative to each other       | 0                | 16    |                | 5%  |
| 5.  | MATCHING FUNDS                               | 3%     | All Projects scored on a curve, from most to least matching funds                           | 10               | 3     |                |      |
| 6.  | POLICY NO. 033 POINTS                        | 75     |                                                                                             |                  |        |                |      |
| TOTAL PROJECT SCORE                      | 300    |                                                                                             |                  |        |                | 100%|
SGIP ELIGIBLE PROJECTS (Planning Grants)

Eligible planning projects include planning activities that facilitate smart growth in either “Potential” or “Existing/Planned” Smart Growth Opportunity Areas (SGOAs) on the SANDAG Smart Growth Concept Map. Proposed planning projects must:

- Encourage transit, pedestrian, and bicycle trips
- Support a community’s larger infill development or revitalization effort
- Improve internal mobility
- Enhance sense of place

Project activities eligible for planning grant funding include but are not limited to:

**Comprehensive planning efforts such as:**

- Specific area plans or community plans
- Amendments to general plans or specific plans

**OR**

**Smaller scale neighborhood planning activities such as:**

- Traffic calming or mobility plans
- Feasibility studies for future capital improvements
- Parking management plans
- Form-based codes or design guidelines
- Planning efforts required to make smart growth zoning changes

Applicants may conduct a Health Benefit and Impact Assessment (HIA) to inform development of local planning efforts funded by the SGIP, such as specific plans, area plans, general plans, or specific plan amendments. HIA uses evidence-based analysis to inform decision-makers of potential health outcomes and health co-benefits of a proposed project, policy, or plan. Often, health outcomes of a proposed project are hidden or unintended and would not otherwise be considered if a HIA were not completed.

Priority will be given to those planning efforts that will result in or allow administrative or expedited approval of smart growth development projects. Planning projects must start within one year of grant award and must be complete within two years of grant award.
HOW WILL PROJECTS BE SCORED?

Once a project has been deemed eligible, it will be scored based on the criteria for its project type. Because the planning activities and capital improvements are very different, each will be scored under its own set of criteria. The project scoring criteria for planning projects are discussed in detail below.

1. **RELATIONSHIP TO REGIONAL TRANSIT**

   Up to five (5) points are available. Transit Infrastructure and Service within the SGOA will be scored as indicated below.
   
   - SGOAs with existing regional or corridor transit infrastructure (five points)
   - SGOAs with programmed regional or corridor transit infrastructure or existing high frequency local transit infrastructure and service (three points)
   - SGOAs with planned regional or corridor transit infrastructure, or programmed or planned high frequency local transit infrastructure and service (one point)

   Note: Rural Villages are not scored on this criterion because the place type does not require transit service. Consequently, Rural Village scores will be normalized to the total 200 points available to other place types.

2. **SMART GROWTH DEVELOPMENT POTENTIAL**

   Up to five (5) points are available. 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 GOALS AND OBJECTIVES**

   Up to 6.67 points are available. 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. **METHOD TO ACCOMPLISH THE SGIP PROGRAM OBJECTIVES**

   Up to six (6) points are available. 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**

   Up to seven (7) points are available. 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 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? How will the public participation process significantly involve a diverse group of stakeholders and help develop consensus for smart growth?

6. **EVIDENCE OF LOCAL COMMITMENT AND COMMUNITY SUPPORT**

   Up to 2.5 points are available. 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?
7. MATCHING FUNDS

Points for matching funds are awarded by dividing the total project cost as proposed in the application by the grant request. The projects will be ranked based on the resulting ratio and the available 20 points will be distributed proportionately. The project(s) with the highest ratio will receive 20 points, and the project(s) with the lowest ratio will receive one point.

8. POLICY NO.033 POINTS

Up to 50 points are available. See Board Policy No.033 for detailed methodology.
<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>CRITERIA</th>
<th>PTS POSSIBLE</th>
<th>WEIGHT MULTIPLIER</th>
<th>TOTAL PTS POSSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Relationship to Regional Transit</td>
<td>Is the transit infrastructure and service within the SGOA existing, programmed or planned?</td>
<td>5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>2.</td>
<td>Smart Growth Development Potential</td>
<td>Evidence of opportunities to develop smart growth plans or projects in the proposed planning area.</td>
<td>5</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>3.</td>
<td>Proposed Project Goals and Objectives</td>
<td>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?</td>
<td>6.67</td>
<td>3</td>
<td>20</td>
</tr>
<tr>
<td>4.</td>
<td>Method to Accomplish Program Objectives</td>
<td>How does the proposed project plan to accomplish stated objectives? How well does the scope of work facilitate meeting project objectives and include public outreach?</td>
<td>6</td>
<td>5</td>
<td>30</td>
</tr>
<tr>
<td>5.</td>
<td>Implementation</td>
<td>Is the project ready to go, will it result in specific implementation actions such as zoning changes or a master EIR?</td>
<td>7</td>
<td>5</td>
<td>35</td>
</tr>
<tr>
<td>6.</td>
<td>Evidence of Local Commitment/Community Support</td>
<td>How has the applicant demonstrated a commitment to implement smart growth? (ordinances, policies, incentives)? How will the plan process engage the community?</td>
<td>2.5</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>7.</td>
<td>Matching Funds</td>
<td>Points awarded in proportion to the percentage of proposed matching funds to total project cost.</td>
<td>20</td>
<td>1</td>
<td>20</td>
</tr>
<tr>
<td>8.</td>
<td>Policy No.033 Points</td>
<td>Points are awarded per jurisdiction based upon the methodology adopted in Policy No. 033</td>
<td>50</td>
<td>1</td>
<td>50</td>
</tr>
</tbody>
</table>

**TOTAL POINTS POSSIBLE** 200
ATGP ELIGIBLE PROJECTS (Capital Grants)

Eligible capital grant projects will result in construction of facilities intended for use by bicyclists and pedestrians, or will provide safer roadway access for bicyclists and pedestrians through traffic calming. Eligible activities include design, right-of-way acquisition, construction, and installation of traffic control devices. Eligible capital grant projects may include but are not limited to:

- New bicycle facilities including paths and bicycle boulevards
- Bicycle lane striping and widening
- New sidewalks, widening of sidewalks, sidewalk gap closures
- New pedestrian facilities
- Pedestrian over and under crossings
- Shortcuts to shorten bike/walk travel time and provide for safer connections
- High visibility crosswalks (ladder/zebra/continental style)
- Bulb outs and intersection treatments
- Roundabouts and traffic circles
- Speed humps and speed tables
- Raised intersections
- Median refuges
- Road diets
- Full or half street closures
- Pedestrian and bicycle-related traffic control devices and pavement markings
- Pedestrian-scale lighting
- Signage and wayfinding

Applicants are encouraged to utilize innovative solutions that are new to the region, and to focus efforts in project areas that (1) lend themselves to development of neighborhood-level bicycle and pedestrian networks, (2) connect residential areas to activity centers such as schools, transit centers, commercial districts, and parks, and (3) are comprehensive and include all of the following: bicycle, pedestrian, and traffic calming improvements.

---

1 The ATGP is supplemented with Transportation Development Act (TDA) revenues.
How Will Projects Be Scored?

1. PROJECT READINESS

A. Completion of Major Milestones

Projects will be scored based on the number of milestones completed. Up to 20 points are available. The scores will be assigned for either completion of each milestone, or proof that it is not required (environmental and right-of-way below) as follows:

- Neighborhood-level plan, corridor study, or Community Active Transportation Strategy: Two points
- Environmental clearance (CEQA and/or NEPA; or evidence that environmental clearance is not required) – Four points
- Right-of-way acquisition (must be complete, including all necessary entitlements, or evidence that no right-of-way acquisition is required) – Four points
- Final design (plans, specifications, and estimates) – Ten points

2. PROJECT CONNECTIONS AND SAFETY

A. Connection to Regional Bicycle Network

Up to eight points are available. Regional Bicycle Network is defined in Riding to 2050: The San Diego Regional Bicycle Plan.

- Project will build direct connection to the network (project must directly connect to an existing or proposed segment of the network) – Six points
- Project will build part of the network, consistent with facility classification proposed in Riding to 2050 – Eight points

B. Completes Connection/Linkage in Local Bicycle Network

Eight points will be awarded if the project proposes to close a gap between existing bicycle facilities. A gap is defined as a lack of facilities between two existing facilities, or a situation where there is an undesirable change in facility type (e.g., a project proposing to change a segment of class III between two class II segments into class II).

C. Completes Connection/Linkage in Existing Pedestrian Network

Eight points will be awarded if the project proposes to close a gap in the existing pedestrian network. Applicant must demonstrate evidence of an existing gap. Examples include missing sidewalk segments, or enhancement of one or more blocks in between blocks that have previously been upgraded.

D. Connection to Transit

Up to 12 points are available; projects that include both bicycle and pedestrian improvements are eligible for points for both modes. SANDAG staff will analyze project area via GIS to determine score. Regional transit station is defined as any station served by COASTER, SPRINTER, San Diego Trolley, Bus Rapid Transit, or Rapid Bus. Distance is defined as walkable distance (accounting for barriers such as canyons)

- Bike improvements
  - Project is within 1.5 miles of regional transit station – Six points
- Pedestrian improvements: Score will be based on actual available walking paths, as mapped in GIS.
  - Project is within 1/4 mile of a local transit stop – Two points
  - Project directly connects to a local transit stop (proposed improvements must directly connect to transit stop) – Four points
  - Project is within 1/2 mile of a regional transit station – Four points
  - Project directly connects to a regional transit station (proposed improvements must directly connect to the station) – Six points
E. Safety Improvements and Overcoming Barriers

Points will be awarded based on applicant description of safety hazard or collision history. Collision data must be highlighted to point out which collisions are applicable to the project area and why they are relevant. Up to 12 points are available.

Completes connection in existing network at location with documented safety hazard or collision history, specifically, correctable crashes involving bicyclists or pedestrians within the last seven years:

A. One to two correctable collisions – Two points
B. Three to four correctable collisions – Four points
C. Five or more correctable collisions – Six points

and/or

Creates access or overcomes barriers in area where hazardous conditions prohibited safe access for bicyclists and pedestrians – up to six points.

To gain points for creating access or overcoming barriers, applicant must describe detractors in the project area that prohibited safe access, such as a lack of facilities, high traffic volumes and speeds in an area with origins and destinations that would warrant bicycle or pedestrian trips if access were safe, freeway on/off ramps, blind curves, steep slopes, etc.

Points will be awarded based on degree of hazard and potential for increased bicycle or pedestrian trips.

Points will be awarded for both collision history and hazardous conditions lacking collision history in two ways:

- Project area with multiple hazardous locations - A project area encompasses two hazardous locations, one with collision data and one that is so unsafe that it prohibits safe access; or
- Project area with an intersection or roadway segment that has both barriers and crash data - A location within a project area has crash data, but also has been identified as a high barrier roadway in The San Diego Regional Bicycle Plan Bicycle Barriers Model.

3. QUALITY OF PROJECT

A. Effectiveness of Proposed Traffic Calming, Bicycle, and Pedestrian Priority Measures

Points will be awarded based on the quality of traffic calming and bicycle and pedestrian priority measures proposed, and the potential for the proposed measures to address the area need as stated by the applicant. Design guidelines such as those outlined in Planning and Designing for Pedestrians, Riding to 2050: The San Diego Regional Bicycle Plan, and the National Association of City Transportation Officials (NACTO) Urban Bikeway Design Guide will be used as a guide to inform scoring.

The highest scoring projects will make significant changes to the area’s transportation infrastructure in a way that results in an environment where reduced vehicular speeds provide for safer access for bicyclists and pedestrians, and definitively prioritizes bicycle and pedestrian access. Examples of highest scoring projects include road diets that reallocate right-of-way and/or reconfigure the roadway to balance access for all modes, and projects that include a broad array of context-appropriate traffic calming devices and bicycle/pedestrian priority measures.

Lower-scoring projects will have fewer features and make only minimal improvements for bicycle and pedestrian access. Up to 15 points are available.

- Traffic calming measures – up to five points
- Bicycle priority measures – up to five points
- Pedestrian priority measures – up to five points

Traffic calming measures will be analyzed for frequency, relative to the following guidelines:

- Residential Street – 20 mph = Devices every 250 feet, so one device would be effective 250 feet on either side
- Collector or Main Street – 25 mph = 400 feet
• Arterial street (traffic taming) – 35 mph = 800 feet

B. Relationship to Program Objectives

Up to 18 points will be awarded based on how well the proposed project meets the Active Transportation Grant Program objectives:

• Encourage the development of a cohesive network of complete streets and improve bicycle/pedestrian neighborhood connectivity to transit and destinations such as schools, retail, places of work, parks, and other community gathering places, and support smart growth placemaking.

• Improve safety for bicyclists and pedestrians through traffic calming and complete streets design principles.

• Serve as models for the region by featuring innovative solutions that comprehensively prioritize access for bicyclists and pedestrians.

• Ensure access to jobs, services, and recreation for populations with fewer transportation choices, and create equitable transportation opportunities for all users, regardless of age, ability, race, ethnicity, or income.

• Increase community support for bicycling and walking as a viable transportation choice for all trip purposes, and promote active transportation as a means of improving health outcomes.

• Support reductions in greenhouse gas emissions and facilitate an increase in levels of bicycling and walking in the region, by providing supportive facilities, amenities and programs for bicyclists and pedestrians.

Consideration will be given to both the number of objectives that the project addresses, and how well the project meets the program objectives, particularly with respect to the following:

• Complete streets
• Improved bicycle/pedestrian connectivity to destinations
• Potential to support smart growth places
• Improved safety
• Innovation and ability to serve as a model in the region
• Prioritization of bicycle and pedestrian access
• Social equity
• Potential to increase bicycling and walking for everyday trips
• Potential to improve health outcomes over time
• Reduction of greenhouse gas emissions

C. Innovation

Up to eight points will be awarded. Four points will be awarded if the applicant provides evidence of the project being an FHWA or state experimentation effort.

Up to four points will be awarded if the project proposes solutions that are relatively new to the region, such as colored bike lanes or shared access lanes, sharrows, cycletracks, reverse angled parking, and other examples. The highest scoring projects will utilize the following innovations such as, but not limited to, those found in the NACTO Urban Bikeway Design Guide, specifically:

Bike Lanes and Cycle tracks
• Buffered bike lanes
• Left-side bike lanes
• Cycle tracks (one-way protected, raised, two-way)

Intersections
• Bike boxes
• Intersection crossing markings
• Two-stage turn queue boxes
• Median refuge island
• Through bike lanes
• Cycle track intersection approach

Bicycle Signals
• Bicycle signal heads
• Signal detection and actuation
• Active warning beacon for bike facility crossing at unsignalized intersection
• Hybrid signal for bike route crossing of major street

Bikeway Signing and Marking
• Colored bike facilities
• Shared lane markings
• Bike route wayfinding signage and markings system

Innovative pedestrian/traffic calming solutions could include:

**Crossings**

- Automated pedestrian detection devices at signalized crossings, including infrared, microwave, and video detectors
- Pre-crossing safety information such as illuminated push buttons and safety advisories to pedestrians and drivers
- Automated “WALK” clearance phase extension for slower crossings such as those made by elderly and disabled pedestrians
- “Animated eyes” and/or pavement markings to remind pedestrians to look for turning vehicles
- HAWK signals
- Rectangular Rapid flash beacons (must include ADA accommodation: a locator note and audible speech to convey that warning lights have been activated, not just that a signal has been activated); in-street lighting is discouraged
- Mid-block chokers
- Mid-block crossings with accompanying signage and enhanced area lighting
- Dynamic lighting at marked crosswalks: focused on the crosswalk and activates when a pedestrian crosses
- High visibility crossings (ladder/zebra/continental style)
- Advance yield bars

**Intersections**

- Right-turn slip lane and crosswalk, with geometry designed to slow turning vehicles
- Right-turn slip lane with raised crosswalk
- Raised crosswalks
- Raised intersections
- Median refuge island with corral
- Median refuge island with pedestrian activation button
- Pedestrian scramble
- Freestanding crosswalk yielding signs
- Traffic circles and roundabouts
- Semi- and Partial Diverters
- Forced Turn Channelization
- Advance stop bars
- Stencils and signage
- Prohibited right turns on red

**Access for Elderly and Disabled Persons**

- Use of rapid ticks and slow chirps instead of speech to indicate when to cross and when to wait (where it is technically feasible to have two poles at least 10 feet apart on a corner)
- Vibro-tactile walk indicators
- Push button locator tone
- Locator tone and walk indication ticks/tones that adjust in response to ambient noise levels
- On traffic pole, tactile arrow running parallel to associated crosswalk

### 4. SUPPORTIVE PROGRAMS AND POLICIES

**A. Complementary Programs**

Up to three points will be awarded if the project includes program activities that complement the capital improvements, such as an awareness program, education or encouragement efforts, and enforcement activities. Consideration will be given to both the breadth and depth of programs proposed.

**B. Supportive Policies and Plans**

Up to three points will be awarded if the project is preceded by a complete streets policy included in a community or specific plan, or a community active transportation strategy. The highest scoring projects will have completed a community active transportation strategy specific to the project area.
5. FORMULA SCORES.

A. Demand (GIS Analysis)

This criterion includes seven factors, listed below. SANDAG will analyze the area relative to the factors below, using GIS. A buffer of a half-mile will be created around the project area for projects with pedestrian improvements, and one mile for projects with bicycle improvements. Results for each factor will be ranked from highest to lowest (with the exception of vehicle ownership, which will be ranked from lowest to highest), in quintiles, for all projects. Projects will then be scored relative to each other, by ranking the raw scores from highest (15 points) to lowest (1 point).

- Population
- Employment
- Population Density
- Employment Density
- Intersection Density
- Activity Centers
- Vehicle Ownership

D. Regional Housing Needs Assessment Incentive- Board Policy No. 033

Points will be awarded based on the “SCORING CRITERIA Concerning Calculation of Board Policy No. 033 Incentive Points” detailed in Exhibit 3 of Board Policy No. 033. Up to 50 points will be awarded.

E. Matching Funds

Other sources of funding for cooperative projects must be explicitly identified. The application must include supporting documentation that shows matching funds have been secured. Matching funds that have not been secured will not count toward this score.

Projects will be scored relative to each other, by ranking the matching funds amounts from highest to lowest. Points will be distributed from highest to lowest. The projects with the most matching funds will receive ten points, and the projects with the least matching funds will receive one point. Projects without secured matching funds will not receive any points for this category.

F. Cost/Benefit

Score will be determined by taking the subtotal score of Criteria 1 through 12 and dividing that subtotal by the grant application amount. Projects will be scored relative to each other by taking the raw scores and distributing them from highest to lowest. The projects with the highest cost benefit ratio will receive ten points, and the projects with the lowest cost benefit ratio will receive one point.

For projects that only include phases prior to construction:

- Project will be scored and ranked together with construction projects
- Score will be reduced according to ultimate phase proposed in project, as follows:
  - Environmental clearance – subtract 75 percent
  - Right-of-way acquisition – subtract 50 percent
  - Final design – subtract 25 percent
## ATGP SCORING CRITERIA MATRIX (Capital Grants)

<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>CRITERIA</th>
<th>POTENTIAL PTS</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>PROJECT READINESS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A.</td>
<td>Completion of Major Milestones</td>
<td>Projects are eligible for points following completion of each phase: Community active transportation strategy/neighborhood-level plan/corridor study Environmental Clearance Right-of-way Acquisition Final Design</td>
<td>Up to 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>PROJECT CONNECTIONS AND SAFETY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A.</td>
<td>Connection to Regional Bicycle Network</td>
<td>Project directly connects to the Regional Bikeway Network or Project is a part of the Regional Bikeway Network</td>
<td>Up to 8</td>
</tr>
<tr>
<td></td>
<td>B.</td>
<td>Completes Connection/Linkage in Local Bicycle Network</td>
<td>Closes a gap between existing bicycle facilities (guidance will include definition of gap, and will include situations where there exists an undesirable change in facility type)</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>C.</td>
<td>Completes Connection/Linkage in Existing Pedestrian Network</td>
<td>Closes a gap in the existing network</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td>D.</td>
<td>Connection to Transit</td>
<td>Bike improvements proximity: Project is within 1.5 miles of a regional transit station Pedestrian improvements proximity: Project is within 1/4 mile of a local transit stop Project directly connects to a local transit stop Project is within 1/2 mile of a regional transit station Project directly connects to a regional transit station</td>
<td>Up to 12</td>
</tr>
<tr>
<td></td>
<td>E.</td>
<td>Safety Improvements and Overcoming Barriers</td>
<td>Completes connection in existing network at location with documented safety hazard or accident history. A. One to two correctable crashes involving nonmotorized users within the last seven years B. Three to four correctable crashes involving nonmotorized users within the last seven years C. Five or more correctable crashes involving nonmotorized users within the last seven years and/or Creates access or overcomes barriers in area where hazardous conditions prohibited safe access for bicyclists and pedestrians.</td>
<td>Up to 12</td>
</tr>
<tr>
<td>NO.</td>
<td>CATEGORY</td>
<td>CRITERIA</td>
<td>POTENTIAL PTS</td>
<td>%</td>
</tr>
<tr>
<td>-----</td>
<td>----------</td>
<td>----------</td>
<td>---------------</td>
<td>---</td>
</tr>
<tr>
<td>3.</td>
<td>QUALITY OF PROJECT</td>
<td>A. Effectiveness and Comprehensiveness of Proposed Bicycle, Pedestrian, and/or Traffic Calming Measures</td>
<td>How well will the proposed traffic calming address the identified need in the project area? Are the proposed solutions appropriate for the situation?</td>
<td>Up to 15</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>How well will the proposed pedestrian improvements address the identified need in the project area?</td>
<td>Up to 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>How well will the proposed bicycle improvements address the identified need in the project area?</td>
<td>Up to 5</td>
</tr>
<tr>
<td></td>
<td>B. Relationship to Program Objectives</td>
<td></td>
<td>How well does the project meet the program objectives?</td>
<td>Up to 18</td>
</tr>
<tr>
<td></td>
<td>C. Innovation</td>
<td></td>
<td>Is this project an FHWA or state experimentation effort?</td>
<td>Up to 8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Does the project propose solutions that are new to the region, and have the potential to serve as a replicable model for other cities in the region? Does the project utilize innovative solutions such as those listed in the NACTO Urban Bikeway Guide?</td>
<td>Up to 4</td>
</tr>
</tbody>
</table>

| 4. | SUPPORTIVE POLICIES AND PROGRAMS | A. Complementary Programs | Is this project accompanied by programs that complement the capital improvements, such as an awareness campaign, education efforts, and increased enforcement? | Up to 3 | 1.5% |
|  | B. Supportive Policies and Plans | Demonstrated policy language in approved plan, or a completed community active transportation strategy/plan | | Up to 3 | 1.5% |

| 5. | FORMULA SCORES | A. Demand (GIS analysis) | Factors contributing to score: population and employment, population and employment densities, intersection density, vehicle ownership, and activity centers. | Up to 15 | 7.5% |
|  | B. Regional Housing Needs Assessment Incentive | Score is based on the formula provided in Board Policy No. 033 | 50 | 25% |
|  | C. Matching Funds | Matching funds can be from any of the following sources: | Up to 10 | 5% |
|  |  | 1. Identified and approved capital funding from identified source. Please provide proof in the form of a resolution or letter of approval. | | |
|  |  | 2. Approved match grant | | |
|  |  | 3. In-kind services. Please provide adequate support documentation. | | |
|  | D. Cost/Benefit | Subtotal Score(not counting RHNA points, not counting match points)/Grant Application Amount | Up to 10 | 5% |

| TOTAL | 200 |
TransNet ACTIVE TRANSPORTATION GRANT PROGRAM (ATGP)¹
NON-CAPITAL GRANTS

ATGP ELIGIBLE PROJECTS (Non-Capital Grants)

Active Transportation Non-Capital Grants can be classified into three categories:

1. Planning

Planning efforts intended to address bicycle and/or pedestrian access at a neighborhood or citywide level, primarily to accommodate non-recreational bicycle and walking trips.

Eligible planning projects include:
   • Comprehensive Active Transportation Strategies – maximum funding amount of $300,000
   • Bicycle master plans – maximum funding amounts are as follows:
     - Cities with population up to 50,000 - $100,000 ($75,000 + $25,000 for environmental) – Coronado, Del Mar, Imperial Beach, Solana Beach, and Lemon Grove
     - Cities with population 50,000 to 150,000 - $150,000 ($125,000 + $25,000 for environmental) – Carlsbad, El Cajon, Encinitas, Escondido, La Mesa, National City, Poway, San Marcos, Santee, and Vista
     - Cities with population greater than 150,000 - $200,000 ($150,000 + $50,000 for environmental) – Chula Vista, Oceanside, and the County of San Diego
     - City of San Diego - $250,000 ($200,000 + $50,000 for environmental)

2. Education/Awareness/Encouragement

Education/Awareness/Encouragement projects include, but are not limited to, the following:
   • Education – Programs to teach walking and bicycling safety skills to children and adults.
   • Eligible education projects can take place at schools, places of employment, community centers, or other venues.
   • Awareness – Multimedia campaigns to impact the attitudes and behavior of the general public, generally to improve safety for all roadway users but bicyclists and pedestrians in particular.
   • Encouragement – Targeted outreach and events designed to encourage walking and bicycling as a viable mode of transportation for everyday/utilitarian trips.

3. Bicycle Parking

Planning and implementation of bicycle parking facilities.

Eligible projects include bicycle racks, lockers, bike corrals, and/or other bike storage facilities such as bike stations. The maximum funding amounts for bicycle parking facilities is $50,000, and for bike stations, $100,000. Facilities must be designed for general public access, i.e. not serving any single place of employment or single activity center.

¹ The ATGP is supplemented with Transportation Development Act (TDA) revenues.
How Will Projects Be Scored?

1. **ALL GRANTS**

A. **Relationship to Program Objectives**

Points will be awarded based on how well the proposed project meets the Active Transportation Grant Program objectives:

- Encourage the development of a cohesive network of complete streets and improve bicycle/pedestrian neighborhood connectivity to transit and destinations such as schools, retail, places of work, parks, and other community gathering places, and support smart growth placemaking.
- Improve safety for bicyclists and pedestrians through traffic calming and complete streets design principles.
- Serve as models for the region by featuring innovative solutions that comprehensively prioritize access for bicyclists and pedestrians.
- Ensure access to jobs, services, and recreation for populations with fewer transportation choices, and create equitable transportation opportunities for all users, regardless of age, ability, race, ethnicity, or income.
- Increase community support for bicycling and walking as a viable transportation choice for all trip purposes, and promote active transportation as a means of improving health outcomes.
- Support reductions in greenhouse gas emissions and facilitate an increase in levels of bicycling and walking in the region, by providing supportive facilities, amenities and programs for bicyclists and pedestrians.

Consideration will be given to both the number of objectives that the project addresses, and how well the project meets the program objectives, particularly with respect to the following:

- Complete streets (planning, encouragement, parking)
- Improved bicycle/pedestrian connectivity to destinations (planning, encouragement, parking)
- Potential to support smart growth places (ALL)
- Improved safety (planning, education, awareness, encouragement)
- Innovation and ability to serve as a model in the region (ALL)
- Prioritization of bicycle and pedestrian access (planning, awareness, encouragement, parking)
- Social equity (ALL)
- Potential to increase bicycling and walking for everyday trips (ALL)
- Potential to improve health outcomes over time (planning, education, awareness, encouragement)
- Potential to reduce greenhouse gas emissions (ALL)

Up to 30 points are available for planning grants, and up to 20 each for education/awareness/encouragement, and bicycle parking grants. The highest scoring projects will demonstrate the potential for measurable impact across multiple objectives.

B. **Comprehensiveness**

**Planning:**

Up to 16 points are available. Points will be awarded according to the comprehensiveness of the proposed planning effort, in terms of both scope and scale. The highest scoring projects will address Complete Streets principles (addressing and prioritizing access for both bicyclists and pedestrians, and traffic calming), or could be considered a Community Active Transportation Strategy (CATS).

The highest scoring planning efforts will aim for significant changes to the area’s transportation infrastructure, resulting in an environment where street design and vehicular speeds provide for safer access for bicyclists and pedestrians, and definitively prioritizes bicycle and pedestrian access.
Lower-scoring projects will plan for only minimal improvements for bicycle or pedestrian access.

**Education/awareness/encouragement:**

Up to 16 points are available. Points will be awarded according to the comprehensiveness of the proposed education, awareness, or encouragement effort, in terms of scope and potential impact.

The highest scoring projects will reach more of the region’s residents, or a specific underserved or vulnerable population such as low-income populations who rely more on walking or biking because they lack access to a car, elderly, or Limited English Proficiency populations. The highest scoring projects will also take place over a longer period of time, and complement a capital improvement project. Higher scoring projects could also be part of a larger transportation demand management effort.

Lower-scoring projects will be smaller in scope, scale, or duration, and will be independent of any capital improvement projects.

**Bicycle Parking:**

Up to 12 points are available. Points will be awarded according to the comprehensiveness of the proposed parking project, in terms of scope and scale. The highest scoring projects will cover a larger geographic area and complement a capital improvement project. Higher scoring projects could also be part of a larger transportation demand management effort.

Lower-scoring projects will be smaller in scope and scale, and will be independent of any capital improvement projects.

**C. Methodology**

**Planning:**

Up to 30 points are available. Points will be awarded according to how well the planning process or proposed effort will meet the demonstrated need and project goals. Highest scoring projects will include a comprehensive planning process in their scopes of work that address the goals of Complete Streets, prioritize bicyclist and pedestrian access, plan for traffic calming, and tie into Safe Routes to School efforts in the project area.

**Education/awareness/encouragement, and parking:**

Up to 30 points are available for education/awareness/encouragement, and up to 10 points are available for parking. Points will be awarded according to how well the proposed effort will meet the demonstrated need and project goals. Highest scoring projects will include a succinct explanation of the need for the project, clearly articulated project goals, and a Scope of Work that directly addresses those goals and lists measurable objectives and deliverables.

Lower scoring projects will have stated a generic need, broad goals, and a scope of work that fails to clearly articulate how the project goals will be met.

Bicycle parking projects must demonstrate that they meet guidelines outlined in *Riding to 2050: The San Diego Regional Bicycle Plan*. Innovations that deviate from the guidelines will be may be considered. The highest scoring bicycle parking projects will be placed appropriately, in appropriate locations, with design that is both attractive and functional, and can demonstrate that they serve the goals as stated by the applicant.

**D. Community Support**

**Planning:**

Up to 16 points are available. Points will be awarded according to the inclusiveness of the planning process, and evidence that key stakeholders will be active participants in the process. The highest scoring projects will demonstrate that:

- the effort is strongly supported by the community,
- community input is a substantive component in the planning process, and
- that key stakeholders, including underserved and limited English proficiency populations, have been identified and will have a meaningful role in the planning effort.
Lower scoring projects will:

- have a Scope of Work that includes minimal opportunities for community input,
- include generic letters of support that fail to show substantive involvement from key stakeholders, and
- fail to involve underserved and limited English proficiency populations (when appropriate in the plan area).

**Education/Awareness/Encouragement and Bicycle Parking:**

Up to 16 points are available for education/awareness/encouragement, and up to 10 points are available for parking. Points will be awarded according to the quantity and quality of the role of community involvement in the project. The highest scoring projects will demonstrate that:

- the effort is strongly supported by the community,
- relevant stakeholders representing the community had input into the methodology,
- community organizations have a substantive role in project implementation, and
- the Scope of Work includes language-appropriate program delivery for non-English speaking populations (for education/awareness/encouragement projects, if appropriate for the plan area).

Lower scoring projects will:

- fail to show meaningful community support,
- include generic letters of support that fail to show substantive involvement from key stakeholders,
- fail to involve community organizations in project implementation, and
- fail to account for limited English proficiency populations in program delivery (when appropriate in the plan area).

**E. Matching Funds**

Other sources of funding for cooperative projects must be explicitly identified. The application must include supporting documentation that shows matching funds have been secured. Matching funds that have not been secured will not count toward this score.

Projects will be scored relative to each other, by ranking the matching funds amounts from highest to lowest. Points will be distributed from highest to lowest. The projects with the most matching funds will receive 20 points, and the projects with the least matching funds will receive 1 point. Projects without secured matching funds will not receive any points for this category.

**F. Cost/Benefit**

Score will be determined by taking the subtotal score of Criteria 1 through 12 and dividing that subtotal by the grant application amount. Projects will be scored relative to each other by taking the raw scores and distributing them from highest to lowest. The projects with the highest cost benefit ratio will receive 18 points, and the projects with the lowest cost benefit ratio will receive 1 point.

**G. Regional Housing Needs Assessment Incentive/Policy No. 033**

Points will be awarded based on the “SCORING CRITERIA Concerning Calculation of Board Policy No. 033 Incentive Points” detailed in Exhibit 3, of Board Policy No. 033. Up to 50 points will be awarded.
2. EDUCATION/AWARENESS/ENCOURAGEMENT AND PARKING GRANTS ONLY

A. Evaluation

Up to 20 points are available. Points will be awarded according to the quality of the evaluation proposed for the project. Highest scoring projects will:

- Have identified performance measures in the application, or will include a task for identification of performance measures in the Scope of Work;
- Include specific pre- and post-data collection efforts as part of the project scope, budget, and schedule in support of evaluating the project’s effectiveness.

Lower scoring projects will lack meaningful evaluation methods or data collection as part of the project.

B. INNOVATION

Up to 10 points are available for education/awareness/encouragement grants, and up to 30 points are available for bicycle parking grants. Points will be awarded for innovative projects that show potential to serve as a replicable model for the region. Highest scoring projects will include innovative methods of accomplishing project goals that have not yet been tried in the San Diego region to date. Lesser points will be awarded to project activities that are relatively new to the region. No points will be awarded if the project proposes activities that are already in practice in the region.

If the proposed practice has been tried in other regions, the applicant must make the case that it has proven to be successful in those regions.

Examples of innovative encouragement projects could include but are not limited to ciclovia or Sunday Streets programs, and bikesharing. Innovative bicycle parking projects include but are not limited to bike corrals, and development of bicycle parking ordinances.

3. PLANNING AND PARKING GRANTS ONLY

A. Demand (GIS Analysis)

This criterion includes seven factors, listed below. SANDAG will analyze the area relative to the factors below, using GIS. A buffer of a half-mile will be created around the project area for projects with pedestrian improvements, and one mile for projects with bicycle improvements. Results for each factor will be ranked from highest to lowest (with the exception of vehicle ownership, which will be ranked from lowest to highest), in quintiles, for all projects. Projects will then be scored relative to each other, by ranking the raw scores from highest (20 points) to lowest (1 point).

- Population
- Population Density
- Intersection Density
- Vehicle Ownership
- Employment
- Employment Density
- Activity Centers
### ATGP EDUCATION/AWARENESS/ENCOURAGEMENT AND PARKING
### SCORING CRITERIA MATRIX (Non-Capital Grants)

<table>
<thead>
<tr>
<th>NO.</th>
<th>CATEGORY</th>
<th>CRITERIA</th>
<th>POINTS POSSIBLE</th>
<th>POINTS POSSIBLE</th>
<th>POINTS POSSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>ALL GRANTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>PLANNING</td>
<td>E/A/E</td>
<td>PARKING</td>
</tr>
<tr>
<td>A.</td>
<td>Relationship to Program Objectives</td>
<td>How well does the proposed project address program objectives?</td>
<td>30</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>B.</td>
<td>Comprehensiveness</td>
<td>Planning: How comprehensive is the proposed plan? (geographic area and emphasis on bike/ped/traffic calming, CATS) Education/awareness/encouragement: Does this effort accompany an existing or proposed capital improvement project? Scale also Parking: Does this effort accompany an existing or proposed capital improvement project?</td>
<td>16</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>C.</td>
<td>Methodology</td>
<td>Planning: How well will the planning process or proposed effort meet the demonstrated need and project goals? Education/awareness/encouragement, parking: How effective will the proposed effort be in meeting the demonstrated need and project goals?</td>
<td>30</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>D.</td>
<td>Community Support</td>
<td>Planning: Does the planning project include an inclusive process? Other: Does the project involve broad segments of the community and does it have broad and meaningful community support?</td>
<td>16</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>E.</td>
<td>Matching Funds</td>
<td>Matching funds can be from any of the following sources: 1. Identified and approved capital funding from identified source. Please provide proof in the form of a resolution or letter of approval. 2. Approved match grant 3. In-kind services. Please provide adequate support documentation.</td>
<td>20</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>F.</td>
<td>Cost/Benefit</td>
<td>Subtotal Score (not counting RHNA points, not counting match points)/Grant Application Amount</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>G.</td>
<td>Regional Housing Needs Assessment Incentive/Policy No. 033 Points</td>
<td>Points will be allocated according to methodology described in Policy No. 033</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>NO.</td>
<td>CATEGORY</td>
<td>CRITERIA</td>
<td>POINTS POSSIBLE</td>
<td>POINTS POSSIBLE</td>
<td>POINTS POSSIBLE</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>-----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>2.</td>
<td>EDUCATION, AWARENESS, ENCOURAGEMENT, AND PARKING GRANTS ONLY</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>A. Evaluation</td>
<td></td>
<td></td>
<td>20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How will the project evaluate its effectiveness?</td>
<td>20</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>B. Innovation</td>
<td></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Is this project new to the region and does it have the potential to serve</td>
<td>10</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>as a replicable model for other cities in the region?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>PLANNING AND PARKING GRANTS ONLY</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>A. Demand (GIS analysis)</td>
<td>20</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Factors contributing to score: population and employment, population and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>employment densities, intersection density, vehicle ownership, and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>activity centers.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>TOTAL POINTS</strong></td>
<td>200</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>
Initially-Proposed Changes to the SGIP and ATGP Program Guidelines

In total, two modifications to the program guidelines were originally proposed. Neither one of the proposed changes would have changed the scoring criteria or any associated weighting. One modification for both the Smart Growth Incentive Program (SGIP) and Active Transportation Grant Program (ATGP) was initially proposed, and one modification for only the ATGP was originally proposed. Both are described below.

Information related to program guidelines, eligible projects, and scoring criteria for both programs (from the second cycle) is provided in Attachments 1 and 2.

Initially-Proposed Modifications to Both Programs – Requirement of Matching Funds

Currently, neither grant program requires matching funds, but both programs provide points for matching funds.¹ Projects that provide a higher percentage of matching funds receive a higher number of points. In accordance with TransNet Extension Ordinance provisions to maximize funding, TransNet funding is leveraged with other fund sources². Over the years, the average matching percentage has been about 20 percent for both programs, ranging from 0 to 50 percent. In an attempt to leverage funds to a greater degree, staff initially proposed instituting a minimum local match requirement of 20 to 30 percent of the total cost of the project. This proposal would not have changed the scoring criteria for matching funds. Projects that provide a higher match than the minimum would still have received a higher number of points. Projects failing to provide the required local match would have been ineligible for funding.

The following comments were received from working group members:

- Members of the Cities/County Transportation Advisory Committee (CTAC) expressed concern over requiring a minimum local match.
- Members of the Regional Planning Technical Working Group (TWG) and Active Transportation Working Group (ATWG) were split on this issue. Some members expressed concern over requiring a minimum local match, especially for smaller jurisdictions that might have a harder time coming up with a match. Others suggested that if a minimum match were to be required, a lower threshold, such as 10 percent of the total cost of the project, should be considered, similar to minimum match requirement thresholds of state and federal programs.
- Members of the Independent Taxpayer Oversight Committee (ITOC) were also split on this issue. While ITOC members agreed with TWG and ATWG members that requiring 20 to 30 percent of the total project cost would be too high, some ITOC members supported requiring at least 10 percent of the total project cost in order to leverage additional

¹In the ATGP (both the capital and non-capital grant programs), projects are scored relative to each other by ranking the matching funds amounts from highest to lowest. The projects with the most matching funds receive the highest points (10 for the capital and 20 for non-capital), and projects with the lowest receive the fewest points. Projects without secured matching funds receive no points. In the SGIP planning grant program, points are awarded in proportion to the percentage of proposed matching funds to the total project cost. In the SGIP capital grant program, projects receive points based on a curve from most to least matching funds.

²“These funds shall be allocated on a regional competitive grant basis. It is intended that these funds be used to match federal, state, local, and private funding to maximize the number of improvements to be implemented.” (Page 8, TransNet Extension and Ordinance, 2004)
TransNet funding. Other ITOC members expressed concern over requiring a minimum match, asking why jurisdictions should be penalized if they have good projects but can’t afford a minimum required match, especially since most applications in the first and second cycles included at least some voluntary match funding.

Based on the comments from the working groups and ITOC, staff is no longer proposing instituting a minimum local match requirement for either program for the third cycle.

Initially-Proposed Modifications to the ATGP Capital Grants Program – Removal of Over/Under $500,000 Category Distinction

The ATGP Capital Grants program contains a provision that approximately 60 percent of capital funds be available to fund projects over $500,000, with a cap of $1.5 million. This $500,000 threshold establishes two categories of projects: projects over $500,000, and projects of $500,000 or less. This category threshold was instituted with the idea that a distinction between large and small projects would allow smaller jurisdictions to compete more successfully for grant funding from this program. Staff originally proposed eliminating these categories as part of the third cycle for two reasons: (1) a smaller volume of grant applications is expected for the ATGP because of the redirection of funds to the Bike Early Action Program approved by the SANDAG Board last year; and (2) the category distinction did not seem to result in the expected outcome of “evening the playing field” between smaller and larger jurisdictions, as was originally anticipated. Staff’s perspective was that given the smaller amount of funding available (approximately $3 million for the third cycle versus almost $9 million for the second cycle), dropping the distinction would help streamline and facilitate the application and review process.

The following comments were received from working group members and ITOC:

- TWG and ATWG members expressed support for maintaining the over/under $500,000 category distinction.
- CTAC members did not comment on this proposed modification.
- ITOC members did not object to eliminating the category distinction.

Given the lack of consensus, staff is no longer proposing removing the category distinction.
Transit Oriented Development Strategy for the San Diego Region

FACT SHEET

Project Overview

The San Diego Association of Governments (SANDAG) is preparing a Regional Transit Oriented Development (TOD) Strategy to assist communities in developing TOD projects and neighborhoods. TOD refers to compact, walkable areas that have easy access to public transit and offer a mix of uses, including housing, retail, offices, and community facilities and gathering spaces. This type of development can help to make the region healthier by reducing greenhouse gas emissions, making it easier to get around by transit, walking or biking, and providing housing and employment opportunities.

The goal of the Regional TOD Strategy is to build on other planning efforts by gathering input and implementation ideas from diverse stakeholders, as well as local and national TOD experts. Feedback about lessons learned and best practices will inform recommendations on ways that the region, local governments, transit agencies, and the private and non-profit sectors can partner to build successful TOD projects. The project will also gather feedback from the public to encourage development that meets the needs of residents and employees.

Communities in the region have embraced TOD as an important framework for organizing future growth. In 2004, SANDAG adopted the Regional Comprehensive Plan based on the principles of smart growth and later developed the Smart Growth Concept Map, which shows “Smart Growth Opportunity Areas” (SGOAs). All 19 local jurisdictions in the region have at least one SGOA. The Regional TOD Strategy will update this earlier work and create prioritized action steps for local agencies and stakeholders. Recommendations will relate to topics such as design, parking, land use policy and zoning, infrastructure, financing, and affordable housing.

Why TOD?

According to growth forecasts, the San Diego region will add nearly one million people, 330,000 homes, and 500,000 jobs by 2050. Organizing future housing and jobs around transit is a critical strategy in preparing for such dramatic change. SANDAG is already emphasizing the link between land use and transportation through its ongoing regional planning effort, San Diego Forward: The Regional Plan. The TOD Strategy will develop an important set of tools to realize the vision of sustainable communities that offer high quality of life for current and future residents.

Project Schedule

The Regional TOD Strategy is a year-long effort that is scheduled to conclude in March 2015. During 2014, the planning team will develop concepts and strategies and collect input on best practices and lessons learned. A draft TOD Strategy and Implementation Plan is expected to be released in the winter for public comment. The SANDAG Board of Directors is expected to consider adoption of the draft TOD Strategy and Implementation Plan in spring 2015.
Opportunities to Participate

In developing the TOD strategy, the planning team will reach out to a wide array of stakeholders. As part of planned focus groups, individuals from varied backgrounds, including transportation, design, community development, housing, and financing will share their perspectives on TOD opportunities and challenges. In the TOD Implementation Forum, experts will highlight project successes and obstacles from other parts of the country and offer potential solutions that can be applied to the San Diego region. Feedback from focus groups and Forum participants will be essential in developing practical TOD recommendations that address local needs and issues. The project also includes coordination with SANDAG committees and working groups, as well as local transit agencies. The Forum, which is expected to be held in the fall of 2014, will be open to the public. The draft TOD Strategy and Implementation Plan will also be available for public review and comment. Please visit sandag.org/ for updates on project outreach events.

For More Information

To learn more about the Regional TOD Strategy and how to get involved, visit sandag.org or contact SANDAG Communications Manager David Hicks at david.hicks@sandag.org or (619) 699-6939.
Preliminary Focus Group Theme Summary

July-September 2014 Interviews – November 6, 2014 CTAC Meeting – Item 8

As part of the Transit Oriented Development (TOD) Strategy for the San Diego Region, SANDAG and AECOM are conducting a series of focus group interviews with stakeholders, representing non-profit organizations, local governments, public agencies, and the private sector.

Groups engaged to date include:

- Real estate developers
- Affordable housing advocates and developers
- Community-based organizations
- Design professionals

The planning team will be scheduling additional focus group sessions in September and October with local governments, other SANDAG working groups, transit agencies and transportation stakeholders, major employers, the development finance sector, and economic development interests.

The purpose of the sessions is to gather targeted, specific feedback on TOD challenges and opportunities in the region and build an understanding of diverse agency, professional, and community perspectives on TOD implementation and user experiences.

Though participants noted specific challenges to TOD implementation, they also saw positive opportunities to develop transit-oriented projects and neighborhoods in the region. Comments also generally reflected an understanding that increased density and improved transit system connectivity will play an important role in accommodating the region’s growth and maintaining its future economic competitiveness. The purpose of this summary is to provide a preliminary overview of the themes that emerged from these discussions.

1. Community opposition can pose a major challenge for TOD implementation.

Concerns over change in the community can trigger specific opposition over project-related issues such as traffic, spillover parking, density, and building height. This challenge highlights the need for continued education and outreach, political support, and partnership building.

- Opposition lengthens the approval process and can cause developers to miss market opportunities
- Put emphasis on community education; it is extremely important to identify successes and failures
- Build a constituency for TOD by focusing earlier on transit
- We have to find a way to tell the story of where the region is going and how we will remain competitive; need to help communities to come along
- Communities need to get the land use regulations in place first and stick with it
2. **There is growing recognition that changing demographics and shifts in market preferences support denser development and vibrant city and town centers.**

Younger residents have different preferences and tend to like density and greater mobility associated with TODs. Employers also see dynamic environments and transit access as selling points for the region.

- Seeing more two person households with one car
- There is a major transition to multi-family units
- People are staying longer in urban environments
- Suburban downtowns are appealing and people are drawn to them
- The competitive environment of the future is different; to recruit and solicit talent, we need to deliver 24-hour amenities
- Transit is a regional infrastructure for recruiting

3. **Connecting housing to jobs is important to both employers and residents.**

Commute patterns and transportation needs have changed in response to shifts in employment. Job access remains a challenge for many workers, especially low to moderate-income workers.

- Need to connect housing to jobs
- More employees are open to locating near transit to attract talent
- System connectivity is important; getting people to job-rich areas in Downtown, Mission Valley, and North County
- Service industry workers in some communities currently face long travel times to jobs
- Focus on certain corridors that link to jobs not just transit

4. **TOD projects can provide more low to moderate-income housing opportunities, but there are continued obstacles to delivering affordable housing.**

There is a recognized need for more low to moderate-income housing in the region. Along with housing, TOD can play a role in improving transportation access and increasing disposable income. Affordable housing projects, however, face challenges related to a lack of reliable funding sources, increasing land costs, and community resistance.

- Project financing for affordable housing is complex, difficult to get, and uncertain
- Tax credits only fund a small number of projects and are not meeting regional need
- Local regulations that require the same proportional mix for affordable and market rate units can create a mismatch between need and what developers can do
- Need to get access to sites along feeders and rapid transit corridors; the window is closing
- Acquisition costs for infill development are rising
5. **The region has promising areas for TOD projects.**

The region has areas with underutilized land that could anchor TOD projects. However, the availability of appropriately zoned land is limited and it is difficult to redevelop existing properties with less intense uses due to issues such as assembling and configuring parcels or the low property tax base, which discourages the selling of land. Opportunity areas in the region include:

- Mission Valley
- Carmel Valley
- UTC
- Grantville
- E Street Station and L Street
- Morena District
- Kearny Mesa
- The City Yards
- El Cajon Boulevard
- University Avenue
- La Mesa
- Carlsbad
- Western Chula Vista
- San Ysidro/Otay Mesa

6. **Successful TOD is about the thoughtful design and planning of the broader setting and transportation network.**

Supporting amenities, community-serving uses, a robust transportation network, and an engaging public realm all contribute to the appeal and viability of TOD projects.

- Need a network of walkability to attract people to multi-family units
- Need uses like shopping and goods and services along transit corridors
- Public realm is most important, even more than the design of individual buildings
- We need to get down to the details of connectivity, including the ability of pedestrians to get to transit
- Building location and orientation is important
- Parks are very desirable; helps to address density concerns and build a sense of neighborhood
- Last mile connections to and from transit are important; car sharing arrangements like car2go can be helpful in addressing connectivity gaps
• There is good support for active transportation as a part of the overall transportation system
• There is some concern that the current transit network is not robust enough yet to make TOD appealing and workable; need to focus on improving the efficiency, frequency, and reach of the existing system

7. **The state regulatory environment can create barriers.**

The California Environmental Quality Control Act (CEQA) process can deter development and opponents can use mitigation requirements to block TOD projects.

• Traffic forecasting methods with a focus on Level of Service have been a big barrier
• Trip generation rates have not been updated in a long time and don't reflect differing geographic contexts
• Trip generation should be tied to product type, and unit type
• On-site drainage is also a major challenge
• Cities need to update their CEQA thresholds

8. **The market economics for TOD remain challenging but flexibility and predictability can help to reduce barriers.**

The viability of TOD projects relies on a balance of land and project costs, market rents, and the type and density of product permissible. Local requirements for project elements such as parking, on site infrastructure, and building height affect project feasibility.

• Even with rental increases, it is difficult to get the financing
• Parking ratios are a problem for market rate units; reducing parking ratios for affordable housing in City of San Diego was great; need to extend for market rate
• Height limit combined with parking ratio can make projects not work
• Lenders and underwriters often want more parking, regardless of codes
• The market is starting to accept some parking within walking distance, not just at the project
• Don’t get to proscriptive on style; give an envelope to work within
• Big infrastructure issue is storm drain and storm water
• The challenge is infrastructure; impact fees are high and there are infrastructure deficits
• Impact fees are being driven up by applying suburban standards to urban contexts
• Having master planning ground rules in place first to get to a ministerial, rather than a discretionary approval process will help
9. **It is important for the regional strategy to set priorities and focus.**

Advancing TOD implementation planning through large-scale master planning is challenging. A more targeted, prioritized approach may be necessary to support successful implementation.

- Focus on the micro scale to advance implementation
- Focus on the most ready area and demonstrate success, then build from there incrementally, rather than all of the station areas at once
- Strategy needs to speak to jobs and economic development on logical corridors; there are good urban spines; work on getting density along these corridors