TRANSPORTATION COMMITTEE AGENDA

Friday, May 7, 2004
9 a.m. – 12 Noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego, CA 92101-4231

AGENDA HIGHLIGHTS

• SMART GROWTH OPPORTUNITY AREAS AND PRINCIPLES FOR INCENTIVE PROGRAM
• I-805/I-5 CORRIDOR STUDY
• ROUTE 11 BUS STOP CONSOLIDATION

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TRANSPORTATION COMMITTEE
Friday, May 7, 2004

ITEM #                  RECOMMENDATION

1. APPROVAL OF MEETING MINUTES  APPROVE

   +A. APRIL 2, 2004 MEETING - REVISED

   +B. APRIL 16, 2004 MEETING

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

   Members of the public will have the opportunity to address the Transportation Committee on any issue within the jurisdiction of the Committee. Speakers are limited to three minutes each. Committee members also may provide information and announcements under this agenda item.

CONSENT ITEM

+3. METROPOLITAN TRANSIT SYSTEM (MTS) ROUTE 11 BUS STOP CONSOLIDATION DEMONSTRATION PROJECT (Mike Daney)  APPROVE

   On January 19, 2004, SANDAG and San Diego Transit Corporation (SDTC) staff implemented a demonstration project on bus Route 11 that consolidated and eliminated bus stops along the route. This project was established to assess the effectiveness of a bus stop consolidation program in providing a cost-effective way to enhance transit reliability and travel speed. The results of this modest demonstration project indicate that there is potential to improve transit service through such programs. It is recommended that the SANDAG Transportation Committee receive this report for information and authorize staff to continue the bus stop consolidation program in partnership with the transit agencies on other routes as appropriate. The results of this program will be reported to the Transportation Committee on a regular basis.

REPORTS

+4. 2004 STATE TRANSPORTATION IMPROVEMENT PROGRAM (STIP) - REVISED  RECOMMEND

   SUBMITTAL (Jose Nuncio)

   On March 26, 2004, the Board of Directors approved submittal of Option C of the 2004 State Transportation Improvement Program (STIP) which maximizes the use of Grant Anticipation Revenue Vehicle (GARVEE) and other bonds. Early feedback from the California Transportation Commission (CTC) indicates that it will not make a decision on which projects will be financed with GARVEE bonds until after the statewide STIP is adopted on August 5, 2004. CTC staff is requesting submittal of a “pay as you go” STIP proposal that does not include GARVEE or other bond financing. Potential programming actions for three projects that are ready to go to construction in the near-term are discussed as well.
5. **INTERSTATES 805/5 CORRIDOR STUDY ALTERNATIVES SCREENING**

   (Elisa Arias)

   The purpose of this study is to identify transportation improvements and services to enhance regional and interregional mobility along the entire Interstate 805 (I-805) corridor and the I-5 corridor south of State Route 54. Eight multimodal alternatives were developed; each includes different levels of transit, high-occupancy vehicle (HOV), managed lanes, and mixed-flow improvements. Based on an analysis of these alternatives, the study’s Technical Working Group recommends continuing four of them (the No Build and three Build alternatives) for further evaluation. The Transportation Committee is asked to approve the continued analysis of these four alternatives.

6. **RECOMMENDATIONS ON SMART GROWTH OPPORTUNITY AREAS AND RELATED ITEMS**

   (Bob Leiter)

   Attached are recommendations from the Regional Planning Technical and Stakeholders Working Groups on the Smart Growth Area Classifications Matrix and principles for a smart growth incentive program for inclusion in the final Regional Comprehensive Plan (RCP). The Transportation Committee is requested to discuss the attached report. Comments will be forwarded to the Regional Planning Committee, and a follow-up report will be presented to the SANDAG Board of Directors at its May 28, 2004, meeting.

7. **UPCOMING MEETINGS**

   The next two Transportation Committee meetings are scheduled for Friday, May 21, 2004, and Friday, June 4, 2004.

8. **ADJOURNMENT**

   + next to an agenda item indicates an attachment
The meeting of the Transportation Committee was called to order by Chair Joe Kellejian (North County Coastal) at 9:16 a.m. See the attached attendance sheet for Transportation Committee member attendance.

1. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

There were no public or Committee member comments.

CONSENT ITEM

2. MASTER MEMORANDUM OF UNDERSTANDING (MOU) WITH THE NORTH COUNTY TRANSIT DISTRICT (NCTD) AND THE METROPOLITAN TRANSIT SYSTEM (MTS), AND SANDAG BOARD POLICY ON ASSET OWNERSHIP AND DISPOSITION (APPROVE)

Chair Kellejian noted that a revised Attachment 1, Board Policy No. 028, was distributed to Committee members.

An MOU between SANDAG, NCTD, and MTS is proposed to establish a central document that includes the current and future agreements between the agencies. The first proposed supplement to the MOU concerns an agreement among the parties regarding ownership of real and personal property. A related Board policy is also proposed concerning ownership and disposal of real and personal property assets. The Transportation Committee is asked to recommend approval of the MOU and the proposed Board Policy to the Board.

Action: Upon a motion by Councilmember Bob Emery (Metropolitan Transit System [MTS]) and a second by Councilmember Jim Madaffer (City of San Diego), the Transportation Committee approved Consent Item 2.

REPORTS

3. REGIONAL TRANSIT SERVICE PLANNING AND EVALUATION POLICY FRAMEWORK (APPROVE)

Staff reported that SANDAG is responsible for transit service planning and fare policy setting, and the Board needs to adopt policies in both of these areas. The Joint Committee
on Regional Transit (JCRT) and a SANDAG Task Force have been working to help guide the
development of a service planning policy. The JCRT has endorsed a framework and a
methodology for evaluating service proposals to use as a demonstration over the next
several months. The framework was developed in collaboration with the transit agencies.

Staff described the service planning framework process. It starts with the Regional
Comprehensive Plan, then MOBILITY 2030, which provides the mid- and long-range
planning; to the Short-Range Transit Plan (SRTP) for FY 2004-2005. The SRTP sets the goals
and guidelines. When service proposals are developed, and if they are consistent with the
SRTP then they would be considered for implementation by the transit boards. If the
proposed service is not consistent with the SRTP then the proposal would be further
evaluated. If it is determined that the proposal is not regionally significant it would go back
to the appropriate transit board for action and/or implementation. If the proposal was
determined to be regionally significant, then it would be considered by the Transportation
Committee. The service and performance monitoring would still be conducted by the
transit boards.

Staff stated that the service evaluation methodology guarantees a variety of services for
diverse travel needs and services areas. The services are compared with its peers: commuter
express, corridor express, urban, suburban, or neighborhood. The evaluation methodology
for services within existing categories includes a quantitative evaluation using productivity
(passengers per revenue hours) and cost effectiveness (subsidy per passenger) criteria. A
qualitative evaluation will be used for new services to address identified gaps and
deficiencies, determine whether the proposed service will support regional transportation
and land use plans and projects, and its affordability. Staff noted that every route in the
system is evaluated every year.

Staff reported that the second policy is a fare setting policy. This issue was presented to the
JCRT but it has not yet been discussed. There are four objectives to this policy: regional,
production, fairness, and simplicity. There are no new fare changes anticipated for FY 2005.
Staff will recommend a policy to the JCRT in May 2004, and SANDAG adoption of this policy
is scheduled for July 2004.

Board Comments:

Councilmember Jerry Rindone (South County) stated that a lifeline service plan should be
included in the service planning framework as a safety net. Staff agreed that that could be
included in the Service Planning Policy.

Councilmember Rindone clarified that there is a third tier of a three-approach fare increase
that was approved previously by the MTS Board. There will be no fare increase over and
above that already approved for FY 2005. He also mentioned that in a similar policy at
MTDB there was a two or three-year period that allowed new services to develop ridership
before they were evaluated with their peer services. He thought that should be included as
well. Staff agreed that the MTDB policy included a two-year trial period for new services to
build up the ridership to perform at a minimum standard. Staff agreed to include this in the
new policy as well.
Supervisor Ron Roberts (County of San Diego) asked if the lifeline service is geographic and/or time related, and how is this defined. Staff replied that with a lifeline network, you look at existing transit service and you guarantee some kind of coverage for that system; however, this does not include areas that do not already have existing services. The guarantee would be some minimal level of service. The Board can also determine access requirements as well, such as one-half mile access. Supervisor Roberts reiterated that the lifeline service would include only existing service operating at some minimum level.

Supervisor Roberts asked who determines if a service proposal has regional implications. Staff replied that the SRTP contains goals and objectives. It would start at the staff level in collaboration with the staffs of the transit boards. If there was disagreement, it would be considered by the SANDAG Executive Team. If there still was disagreement, then the matter would be presented to the Transportation Committee. After action by the Transportation Committee, the proposal would go back to the appropriate transit board for implementation. Staff noted that the issue of public hearings is still being discussed.

Supervisor Roberts commented that the reality is that service changes are frequently contested by some group of people, and the determination of regional significance is subject to interpretation.

Chair Kellejian agreed that we need to strengthen the difference between local and regionally significant service proposals.

MTS Chair Leon Williams noted that the Policy Task Force did not consider the issue of subsidy as an evaluation measure for lifeline service. He stated that the issue is that some lifeline service may have a high subsidy amount. He suggested the consideration of a side subsidy that would allow someone to take a taxi rather than continuing to operate a high-subsidy service with low ridership.

Chair Kellejian noted that NCTD does have a policy with regard to capacity. He suggested that staff look at that policy. Karen King, NCTD Executive Director, stated that NCTD’s ridership measurement is that anything for lifeline service that had less than six riders per hour would be considered for elimination.

Councilmember Emery agreed that there should be a more specific determination of regional significance for proposed transit service in the guidelines as well as a subsidy trigger.

Councilmember Rindone added that if a transit service has less than 25 percent regional funding, then it would be clearly within the authority of the transit board. He suggested that language be included in the policy to indicate that if a service meets that criteria, it cannot be appealed to SANDAG.

Chair Kellejian noted that there were no requests to speak on this item.

Supervisor Roberts commented that the objective for this Committee is to minimize its overview with respect to how the operations are being conducted on a daily basis. With respect to a lifeline system, financial considerations need to be included.
Chair Kellejian stated that by keeping highly subsidized services, you are depriving other areas of having more frequent or efficient service.

**Action:** Upon a motion by Councilmember Rindone and a second by Councilmember Emery, the Transportation Committee approved the following actions:

1. The transit service planning framework for use in developing a transit service planning policy, including incorporation of the following direction by Transportation Committee members related to lifeline service, including a clarifying statement that if a proposed route is purely local and doesn’t have at least a 25 percent regional impact it may not be appealed to SANDAG, and a limit to the amount of subsidy for lifeline service.

2. The use of the service evaluation methodology as a demonstration of the policy process for evaluating new and existing services for the FY 2005 budget development process;

3. The framework for developing a fare-setting policy; and

4. Direct staff to return to the JCRT in May 2004 with an evaluation of the application of the service planning framework and service evaluation demonstration to guide a subsequent JCRT recommendation to the Transportation Committee for a Transit Service Planning and Performance Evaluation Policy

**4. UPDATE ON TRANSIT FIRST SHOWCASE PROJECT (APPROVE)**

Staff provided a status report on the Transit First Showcase project. The Transit First service concept has four different levels: community-based shuttles, systemwide mobility, intercommunity travel, and regional travel. Staff showed the alignment for the Transit First Showcase Project from San Diego State University (SDSU) to downtown San Diego. Major activities contained in the last report included development of project goals and ridership projections, commencement of traffic studies, transit signal priority research, conceptual station design, and public outreach and coordination efforts. Major activities for this report include the traffic and parking study, refinement of station design, preparation of shelter plans, transit signal priority approach, Balboa Park interface, preliminary cost estimates, and continued public outreach and coordination. Staff indicated that the top three project goals are to reduce transit travel time and improve reliability, attract new ridership through service and frequency upgrades, and enhance the customer experience.

Chair Kellejian noted that the reality is that if the TransNet Extension does not pass this project is in jeopardy.

Supervisor Roberts expressed concern about the sign in the station simulation as businesses along El Cajon Boulevard depend on visibility from cars driving by. Staff indicated that it was felt the sign would protect passengers from the street. Supervisor Roberts suggested that the sign and the canopy be eliminated and that more seating be added. He also suggested that the cost estimates include the amount of money it would cost to return the station sites to their original situation if the demonstration is not successful. He noted that we should try to make minimal changes within the community during the demonstration.
Councilmember Judy Ritter (NCTD) liked the idea of the transit network plan.

Councilmember Madaffer expressed his support for global positioning satellite (GPS) technology, indicating that it will be less expensive as time goes on. He added that we should use this technology to provide information for passengers. Staff agreed that GPS could provide real-time information at each station. Staff stated that, if funding was available, this project would be ready to proceed within the next two years.

Staff reported that there is a demonstration project with the Airport Flyer this summer that will use GPS to provide real-time information for customers. Staff is working with MTS and NCTD on the costs to operate and maintain this type of technology.

Councilmember Madaffer stated that on April 13 the San Diego City Council will hear a report related to the improvements around the San Diego Zoo. Staff stated that the Zoo is not addressing the disposition of Park Boulevard in their plans. Staff has been working with the City of San Diego’s Park and Recreation Department which has supported the concept of a “transit lane” along Park Boulevard through Balboa Park. Councilmember Madaffer indicated that he would provide his support for this concept at the April 13 San Diego City Council meeting.

Public Comment:

Charles Daniels, representing the City of San Diego Park and Recreation Department, conveyed their support for this project. They have been working on the Balboa Park Circulation Study and have received extensive community input on this project. The preliminary recommendation will be to incorporate this project onto Park Boulevard, support the shared transit lane concept on Park Boulevard, and support bus rapid transit (BR) on Fourth and Fifth Avenues in the area of Balboa Park. They hope to conclude their study in the next few months, and they will continue to work with SANDAG staff. He stated more information about the Balboa Park Circulation Study, can be found on the following Web site: www.jonesandjones.com/balboapark.

Clive Richard, a member of the public, noted that there seemed to be a discrepancy on the names of the streets in Attachment 1. He questioned the amount of money to provide replacement parking spaces. He suggested that a parking structure be considered instead. He also expressed concern about shared lanes. Staff responded that the street designations were cut off on Attachment 1. In addition, a real estate professional is assisting staff in looking at land acquisition costs for replacement parking. Staff clarified that the amount of parking spaces impacted depending on whether you go with a transit lane or a shared lane. The recommendation was to go with a shared lane in the middle section of the project. We do have a Transit First map and the Regional Transit Plan. The Transit Network Plan would be more detailed with a smaller geographic area and include bus and shuttle services.

Councilmember Emery suggested that we look at a differentiation of terms between BRT and the Showcase Project to eliminate confusion.
Pedro Orso-Delgado, Caltrans, indicated that Qualcomm is coming up with technology that would allow cell phones to pick up real-time transit information.

**Action:** Upon a motion by Councilmember Emery and a second by Supervisor Roberts, the Transportation Committee approved the following actions:

- Support the concept of a “transit lane” along Park Boulevard through Balboa Park, to be designed in collaboration with the City of San Diego Park and Recreation Department as it completes the Balboa Park Parking and Circulation Study and plan amendments.

- Approve the following Action Plan to further define the Showcase Project and address issues that have arisen in project planning to date:
  1. Authorize the preparation of a work scope, in collaboration with the Mid-City community, to conduct a Mid-City Transit Network Plan at a cost of approximately $75,000 to be funded from the Showcase Project budget. The Transit Network Plan would define the operating concept for the Showcase Project in the context of a community-wide transit network.
  2. Pursue a peer review of industry experts to evaluate and provide input to the Showcase Project design and Transit Network Plan.

- Defer further preliminary engineering and final design work on the Showcase Project pending the completion of the Action Plan, which would result in completing the Final Design by mid-2006 with project opening (assuming funding availability) in 2007-08.

- Incorporate comments made by Transportation Committee members.

Chair Kellejian called a five-minute break at 10:48 a.m. and reconvened the meeting at 10:53 a.m.

5. **UPDATE TO MEMBER AGENCIES FROM THE LOS ANGELES-SAN DIEGO-SAN LUIS OBISPO RAIL CORRIDOR AGENCY (LOSSAN) (SUPPORT)**

Staff reported that the San Diego region is well represented with Chair Kellejian representing SANDAG, Councilmember Rindone representing MTS, and Councilmember Julie Nygaard, representing NCTD. Staff noted that the LOSSAN corridor is the fastest growing corridor in the region, and reviewed key changes in the corridor since 1989. Staff also provided corridor ridership statistics, which include Amtrak’s Surfliner, the Coaster, and Metrolink commuter rail services. Staff noted that there have been major increases in service since 1974. Staff reported that last year Metrolink, Coaster, and Caltrans, started a six-month demonstration program where Metrolink and Amtrak riders can catch the next train using both services. The Surfliner trains were on time 95 percent of the time. Staff reported that over half of the delay in Surfliner service was related to interaction with other trains. Many of the priority projects (including double-tracking) that LOSSAN is advocating will address this issue.
Staff provided information on the funding success of this corridor, stating that more than $1 billion has been invested by the state, more than $300 million by local agencies, and more than $200 million by Amtrak. Staff reviewed several regional priority projects, operations funding, future plans, and challenges ahead.

Staff also provided information on LOSSAN as an agency. The original objectives of the Rail Corridor Agency included: reduced running time, improved productivity, reduced interference, increased accessibility, increased safety, increased trains/Seats, and increased comfort. Staff also reviewed the structure and member agencies.

Chair Kellejian concluded that there are many challenges within the agency and the corridor itself including funding, the future of intercity operations, capacity, and acceptance by member agencies. Chair Kellejian introduced Warren Weber from Caltrans and Liz O'Donoghue from Amtrak.

Councilmember Madaffer asked to what extent LOSSAN is involved in adding its influence to the High Speed Rail Authority related to new technologies. Staff responded that LOSSAN will provide comments on the Authority's draft environmental document. Specific comments will depend on LOSSAN's member agencies.

Councilmember Rindone said that he will be discussing Maglev technology at the May LOSSAN meeting.

Councilmember Ritter expressed pleasure with the Rail-2-Rail program and would like to see daily distance-based pricing for this program in addition to monthly passes.

Ms. O'Donoghue indicated that March was the highest ridership number for the Rail-2-Rail program. This was 30 percent higher than March of last year. It has been a great success for Metrolink and Amtrak.

Councilmember Ritter commented that it would be nice if this program could be expanded to riders who are not monthly pass holders.

Action: Upon a motion by Councilmember Rindone and a second by Councilmember Emery, the Transportation Committee approved the following actions: (1) support LOSSAN efforts to improve the coastal rail corridor; and (2) continue to make conventional rail improvements along the coastal rail corridor a regional priority.

6. UPCOMING MEETINGS

The next meeting of the Transportation Committee is scheduled for April 16, 2004.

7. ADJOURNMENT

Chair Kellejian adjourned the meeting at 11:09 a.m.
## CONFIRMED ATTENDANCE
### SANDAG TRANSPORTATION COMMITTEE MEETING
#### APRIL 2, 2004

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TRANSPORTATION COMMITTEE DISCUSSION AND ACTIONS
Meeting of April 16, 2004

The meeting of the Transportation Committee was called to order by Chair Joe Kellejian (North County Coastal) at 9:03 a.m. See the attached attendance sheet for Transportation Committee member attendance.

1. APPROVAL OF MEETING MINUTES

Action: Upon a motion by Oceanside Mayor Terry Johnson (San Diego County Regional Airport Authority [Airport Authority]) and a second by Poway Councilmember Bob Emery (Metropolitan Transit System [MTS]), the Transportation Committee approved the minutes from the March 5, 2004, and April 2, 2004, meetings.

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

Chuck Lungerhausen, a member of the public, congratulated the Transportation Committee for coming together with the TransNet action, but he said that more needs to be done. We need a one percent sales tax for public transit in order to make it work in San Diego County. There are too many needs for bus transportation in North County that are not being met. The City of Chula Vista has rights-of-way set aside for transit but there is no money to expand transit. We are promoting transit but we don’t have the funds to get expand it. If all of the elected officials in the county would come together and support a one percent sales tax for transportation we would be a lot better off.

Chair Kellejian noted that he was going to have to leave early and recommended that Mayor Mickey Cafagna be appointed Chair Pro Tem in his absence.

Action Taken: Upon a motion by Mayor Johnson and a second by Councilmember Emery, the Transportation Committee unanimously appointed Mickey Cafagna to serve as Chair Pro Tem in the absence of the Chair for this meeting.

CONSENT ITEMS (3 through 7)

Chair Kellejian noted that Item No. 5 has been pulled from the consent calendar and would be heard following approval of the consent items.
3. 2002 REGIONAL TRANSPORTATION IMPROVEMENT PROGRAM (RTIP) QUARTERLY AMENDMENT (APPROVE)

The SANDAG Board, at its meeting on June 28, 2002, adopted the 2002 Regional Transportation Improvement Program (RTIP), the five-year program of major transportation projects in the San Diego region covering the period from FY 2003 to FY 2007. During the course of the two-year RTIP cycle, SANDAG processes amendments on a quarterly basis. Amendment No. 18 includes requests for revisions from local agencies. The Transportation Committee is asked to adopt Resolution No. 2004-18, approving Amendment No. 18 to the 2002 RTIP.

4. JOBS ACCESS REVERSE COMMUTE (JARC)/AIR POLLUTION CONTROL DISTRICT (APCD) – FUNDED TRANSIT SERVICE (APPROVE)

In 2002, the Metropolitan Transit Development Board (now Metropolitan Transit System [MTS]), through SANDAG, was awarded $200,000 in JARC and APCD funding to operate a reverse-commute, peak-period transit service from downtown San Diego and Mid-City to the Poway Business Park. The service would provide employment access between areas where heavy concentrations of CalWorks’ clients live and work. MTS would operate the service using the two-year grant funding. The Transportation Committee is asked to authorize the use of the grant funding for the service (Route 830) beginning in July 2004.

6. FEDERAL TRANSPORTATION ENHANCEMENT ACTIVITIES (TEA) PROGRAM: QUARTERLY PROGRESS REPORT (INFORMATION)

In March 2000, the SANDAG Board of Directors approved the allocation of TEA funds to nine projects and directed the Transportation Committee to receive progress reports on a quarterly basis. This quarterly progress report covers the period January to March 2004. Two projects are complete and the remaining seven projects are progressing according to their approved schedules.

7. SURVEY AND ANALYSIS OF TRADE AND GOODS MOVEMENT BETWEEN CALIFORNIA AND BAJA CALIFORNIA, MEXICO (INFORMATION)

This survey was sponsored by the California Department of Transportation (Caltrans) to collect valuable information on international commercial crossings to assess cross-border shipping patterns at ports of entry.

Action: Upon a motion by Mayor Johnson and a second by Councilmember Emery, the Transportation Committee approved Consent Items 3 through 7, including Resolution No. 2004-18, with the exception of Item No. 5.
5. MEMORANDUM OF UNDERSTANDING WITH THE NORTH SAN DIEGO COUNTY TRANSIT DEVELOPMENT BOARD (NCTD) WITH RESPECT TO SPRINTER FINANCING (RECOMMEND)

The Director of Finance reported that due to the suspension of the state Traffic Congestion Relief Program (TCRP), the SANDAG Board, at its March 26, 2004 meeting, had approved the programming of funds to pay off bonds that may be issued by NCTD for the Sprinter project if the $80 million of TCRP funds do not materialize. This action included programming funds from the State Transportation Improvement Program (STIP), which requires approval from the California Transportation Commission (CTC). The CTC has indicated that it is unlikely to approve the STIP funds to service this debt. As an alternate plan, funds from the Congestion Mitigation and Air Quality (CMAQ) program would be used. NCTD is working with a financing institution that is requesting a Memorandum of Understanding (MOU) between NCTD and SANDAG acknowledging the programming of future funding to cover the debt service on the Sprinter. This MOU memorializes the action taken by the SANDAG Board at its March 26, 2004, meeting.

The Director of Finance reviewed the following significant points: NCTD will still be responsible for construction of the Sprinter project, NCTD will make the debt service payments using its share of local dollars in FY 2005-2007, NCTD shall submit quarterly and annual reports to the SANDAG Executive Director, and SANDAG shall annually program, beginning in FY 2008 and through FY 2017, if necessary, STIP or CMAQ funds in the amount necessary to make the scheduled interest and principal (up to the $105 million) payments. This will allow the Sprinter project to continue on schedule. Staff is asking that the Transportation Committee recommend that the SANDAG Board of Directors authorize the Executive Director to sign this MOU.

Chair Kellejian stated that we need to hold the state accountable for the commitment it made to us regarding TCRP funds for this project. We need to be diligent in encouraging the state to meet this obligation. The Federal Government may not look favorably on future projects with state funding the state if it does not meet its funding commitments.

The Director of Finance noted that staff has had several conversations with the Federal Transit Administration (FTA) and assured it that we will continue to encourage the state to meet its financial obligation to this project and that the alternate financing option of using CMAQ funds does not release the state from this obligation.

Councilmember Jack Feller (NCTD) stated that the NCTD Board approved the agreement with the Burlington Northern Santa Fe (BNSF) Railroad for handling freight movements during construction. The cost was initially estimated at $31 million and it looks like it will be more in the range of $3 million, though there are still some negotiations left to do. This will be a considerable savings.

Action Taken: Upon a motion by Councilmember Emery and a second by Mayor Johnson, the Transportation Committee unanimously approved a recommendation to the SANDAG Board of Directors to authorize the Executive Director to execute an MOU with NCTD, in
The Director of Finance introduced this item by stating there will be a series of items to educate the Transportation Committee about the transit operators’ budget process. Information will be presented on FY 2004 to date, the projections for the next five years, and transit challenges.

Diane Hessler, Chief Management Accountant, described NCTD’s mission and vision statement. She noted that NCTD provides the following services: the Coaster commuter rail; the BREEZE fixed bus route; the FAST demand-responsive service; and LIFT, the Americans with Disabilities Act (ADA) paratransit service. NCTD also operates another mode, the railroad and right-of-way. This is necessary for continuing Coaster service; it is part of the Los Angeles – San Diego – San Luis Obispo (LOSSAN) rail corridor; it is used by Amtrak, Metrolink, and BNSF; and handles freight, all of which reduces congestion on the region’s highways. This right-of-way has significant maintenance and improvement financial needs, it requires a systematic, priority-based replacement program, and it is essential to preserving transit needs and managing safety and risk.

Ms. Hessler reviewed the sources of operating revenues including Transportation Development Act (TDA) sales tax (44 percent), TransNet (7 percent), FTA (12 percent), other state and local funds (3 percent), passenger fares (22 percent), auxiliary revenue (10 percent), and nontransport revenue (2 percent). The operating expenses are divided as follows: wages and benefits (52 percent); services and fees (19 percent); purchased transportation (12 percent); fuel, tires and other supplies (10 percent); casualty and liability (3 percent); and other expenses (4 percent). She noted that there are 610 employees and 73 percent are union employees.

Chair Kellejian left at 9:22 a.m., therefore, Chair Pro Tem Cafagna took over meeting.

Ms. Hessler provided information on FY 04 revenues and expenses, and stated that they appear to be tracking close to budgeted amounts. She noted a few areas of exposure, including workers compensation and fuel price increases. The budget objective is to develop a balanced operating budget and a viable capital improvement program to provide a sustainable level of service, work with available resources, and balance the capital and operating needs. The budget challenges are that revenues are flat or modestly increasing; operating expenses are increasing, some significantly and beyond NCTD’s control; unfunded capital needs are sizeable, and some of those are time-sensitive.

Ms. Hessler described the revenue and expense outlook for FY 05 versus FY 04 noting that passenger fares are proposed to increase by 6 percent; auxiliary revenues by 8 percent; nontransportation revenues by 6 percent and federal, state, and local grants reflecting modest increases. She stated that operating expenses have increased, and in many cases the increases have exceeded the rate of revenue increases. Budget uncertainties include federal reauthorization of the “Transportation Equity Act: A Legacy for Users (TEA LU),” substantially the same form included in the agenda item, related to financing $80 million and associated interest costs for the Sprinter if the TCRP funds do not materialize.
the state funding situation, the TransNet Extension, fuel and utilities, and labor negotiations. Other budget assumptions include maintaining staff levels, maintaining current service levels, Sprinter operations beginning in mid-2007, utilization of $14 million in TDA reserve, and CMAQ funding of $5 million per year for 2007-2009. Information on the revenue service hours and passenger miles for NCTD’s four services was also provided.

Projected revenues and expenses for FY 2005-09 indicates funding shortfalls in years FY 2005 and 2006, and funding carryovers in FY 07 through FY 09. Possible options to adjust the financial capacity are to increase revenues, reduce expenses, reallocate services, reduce staffing levels, reduce or defer projects in the Capital Improvement Program (CIP), reduce services, and TransNet reauthorization. There have been no service extensions since 2001. Ms. Hessler noted that a reduction in service is the last option the NCTD Board would prefer to consider.

Chair Pro Tem Cafagna asked about the cost per hour as it relates to the different modes. Ms. Hessler said that the target is to achieve a 20 percent farebox recovery rate. She indicated that the most disappointing is the LIFT service with a target return of 9 percent and is actually returning about 7 percent. The recovery ratio goal for the Coaster is 37 percent. The Coaster’s March ridership was the best in its history and staff believes the recovery ratio may rise as a result of this increased ridership level. With regard to ADA service, NCTD is planning on introducing an “assistance ride for free” program. This is a method to encourage ADA riders to utilize our ADA-compliant services with an aide.

Mayor Pro Tem Phil Monroe (South County) asked about the relational budget impact when diesel fuel increases. Ms. Hessler estimated that it would have a $7,000 impact.

Mayor Pro Tem Monroe asked about the fuel prices included in the projections. Ms. Hessler responded that they originally assumed $1.15 per gallon for FY 05 and subsequently has revised that figure for future years.

Councilmember Jack Dale (East County) asked if the transit boards had considered using compressed natural gas (CNG) as an alternative. Ms. Hessler replied that the NCTD Board’s mandate has been to replace diesel fueled vehicles with CNG vehicles over time. They have scheduled 15 new CNG vehicles in the next capital cycle. They operate a little less efficiently than diesel, but CNG prices are not as volatile as that for diesel.

MTS Executive Director Paul Jablonski next provided the MTS preliminary budget presentation. He provided background information including fixed-route bus services; the light rail transit (LRT) system; ferry; demand-responsive, rural, and ADA paratransit services; an integrated transit system with a uniform fare structure, coordinated routes and schedules, and regional marketing, as well as authority as the municipal taxicab regulatory agency; and owner of the San Diego and Arizona Eastern (SD&AE) Railway.

As a side note, Mr. Jablonski stated that the trolley seems to be carrying around 30 percent of the gate for Padres games.

Mr. Jablonski mentioned that there is a half-day session planned with the MTS Board on May 8 to discuss the details for developing a strategy for balancing the budget.
Jablonski reported that previously there were three boards (MTDB, San Diego Transit Corporation [SDTC], and San Diego Trolley, Inc. [SDTI]), now the MTS Board sits for all three entities. He listed the members of the MTS Board.

Mr. Jablonski stated that with all MTS bus and LRT services combined there are 241,000 average weekday passengers, 73 million annual passengers, and 1,877 employees. He provided facts related to LRT and bus operations, and its other functions including the Coronado Bay Ferry; Taxicab Administration; SD&AE Railway; regional bus stop, shelter, and bench programs; and transit center maintenance.

Mr. Jablonski reviewed the LRT and bus infrastructure needs, and the impacts of the aging infrastructure needs. He said that they will need to replace 120 vehicles over next 40 years, and this element is unfunded. He said that the real issue is that when infrastructure ages it requires more costs and labor in order to maintain it.

Mr. Jablonski reviewed the MTS mid-year FY 04 operating budget changes as of February 2004, which showed a projected surplus for FY 04 of $262,830. The MTS mid-year FY 04 operating budget had $173.9 million in operating expenses, $67.2 million in operating revenues, requiring a $106.7 million operating subsidy. He said he was confident that they will be on budget at year’s end.

Mr. Jablonski stated that the plan adopted by the MTS plan in June 2003 contained the following five major components: use contingency reserves, use federal capital funds for preventative maintenance for operations, fare increases in FY 05 and FY 06, greater use of TransNet for operations, and annual service reductions and operational efficiencies.

He reviewed the FY 05 sources of revenue, revenue trends, expenditures, MTS budget assumptions, and the MTS preliminary FY 05 operating budget. He provided information on the ranges of the unfunded deficit in FY 05 through FY 09. The cost pressures include: energy costs (diesel, CNG), pension costs, liability insurance costs, health insurance costs, and workers compensation.

Mr. Jablonski noted that the policy choices are: (1) a sustainable level of service components (efficiency improvements, budget and cost reductions, and adjustments to low-performance services), (2) nonrecurring revenue components (MTDB contingency reserve and federal CMAQ funds for Mission Valley East [MVE] for FY 05-08), and (3) other considerations such as new service proposals.

He said that it is critical for the region to recognize that a significant funding shortfall exists, TransNet’s reauthorization is a necessity for the continuance of our existing programs, and replacing aging infrastructure is an unfunded priority that threatens the reliability and cost-effectiveness of our system.

In response to a question from Councilmember Feller, Mr. Jablonski explained that the personnel figures did not include all of the contract employees.
Councilmember Jerry Rindone (South County) stated that as a result of the consolidation, MTS has been left with some staffing gaps, and there will be some examination of that at MTS with recommendations for staffing adjustments within the next six months.

Councilmember Rindone explained that the fare increase mentioned by Mr. Jablonski, was approved by the MTS Board to be spread out over three years.

Councilmember Rindone said that the MTS report did not include projections of TransNet Extension funding. He stated that the passage of the TransNet Extension is critical, and we all need to work together towards that end.

Chair Pro Tem Cafagna acknowledged that MTS staff was gutted as part of consolidation. He wondered if the MTS staff is doing part of the work that transferred to SANDAG, and if the efficiencies expected from consolidation will work themselves out over time. Mr. Jablonski responded that MTDB went from 100 employees to 40, and the vast majority of those are involved in the operation of our contracted system. If you take that out, there are only 10-12 people left to handle other duties. He noted that he just gave the MTS Board a reorganization plan. He said that the way to gain efficiencies is by looking at SDTC and SDTI and determine if they have functions that can be blended under MTS such as finance and accounting, human resources, and potentially facilities or procurement. We are looking to create the functions in a regionalized basis.

Chair Pro Tem Cafagna asked if he has calculated those efficiencies in the budget. Mr. Jablonski replied negatively as they are still in the infancy of reorganization at this point. He added that there are pension and union issues related to consolidating these entities.

Supervisor Ron Roberts (County of San Diego) said that an audited review of the impacts of the consolidation should be conducted. He stated that there have been some changes with SDTI and SDTC that have had nothing to do with consolidation. He thought that more is being spent administratively as a result of consolidation. He commented that MTS is “in shambles” due to the lack of staff and experienced personnel.

Councilmember Emery agreed that not all of the results to date were foreseen through consolidation planning; however, we are attempting to put together an agency that was required by Senate Bill (SB) 1703. We need to be looking at the whole process. We should be looking at what can we do to further assist the two operating organizations and to pay close attention to infrastructure replacement costs. He does not agree with Supervisor Roberts’ assessment that MTS is “in shambles.”

Supervisor Roberts stated that Mr. Jablonski is doing a great job. The external audit he mentioned was for the whole system, not just for MTS. This state legislation was imposed on the region. He would like to know the full cost of consolidation.

Chair Pro Tem Cafagna stated that there were those who supported SB 1703 as the lesser of several evils. He felt that there would be an eventual benefit to consolidation. As required in this legislation, SANDAG is to provide a report to the state Legislative Analyst’s Office (LAO) to prove that consolidation is working and efficiencies have been made.
Councilmember Christy Guerin (North County Coastal) agreed that there are concerns about reorganization. Several SANADG Board members had expressed concern about the disparate number of MTDB employees that transferred to SANDAG versus the limited number of NCTD employees. She said that we will need to get a handle on these impacts if we are going to do the LAO report. The SANDAG Board asked for a true accounting related to employees and efficiencies and the cost to each agency. She hoped that SANDAG staff could report back on this.

Eric Pahlke, SANDAG Chief Deputy Executive Director for Operations, responded that some information on a preliminary basis was transmitted to SANDAG Board members recently. We are working on the requirement for an analysis of the consolidation at the end of this calendar year as part of SB 1703. Tom Larwin, SANDAG Chief Deputy Executive Director for Policy, stated that a memo was sent to the SANDAG Board that covered staffing costs. However, it did not include efficiencies. He noted that not all of the employees that are slated for transfer to SANDAG have moved. Once everything gets in place then management systems will be put in place that will require reactions. He estimated that it will be a couple of years before things settle down. He acknowledged the legitimacy of the concerns but didn’t feel that we would have solutions until we get further along in the process.

Councilmember Dale (East County) commented that he takes the trolley to events in downtown San Diego even though it takes more time and costs more than driving. He thought it was important that the public see elected officials using the mass transit system. He said that the MTS Board has to make some really hard decisions when it comes to eliminating low-performing routes, but we simply cannot afford to continue to fund those trips. He said that the SANDAG Board and area city councils need to support those hard decisions. Councilmember Dale also commented that consolidation is about more than just cost efficiencies; if it had only been about cost savings we would have done it without SB 1703.

Mayor Pro Tem Monroe said there is another way of looking at efficiency and that is to increase service, increase fares, and increase passenger miles. The objective of consolidation was to provide better service and we need to improve on this.

Mayor Pro Tem Monroe mentioned that radio personality Roger Hedgecock has started a campaign that is anti-transit, and this worries him. He suggested that SANDAG develop a strategy to engage in a dialogue with Mr. Hedgecock.

Councilmember Judy Ritter (NCTD) said that are looking to move people. She noted that SB 1703 was a mandate. She pointed out that MTS and NCTD have very different organization structures. Planning for NCTD has always been done at SANDAG so few staff were transferred over. It will take time to complete the consolidated organization.

Chair Pro Tem Cafagna noted that our problems are greater than efficiencies. He reminded Committee members that this bill came along with a jobs protection provision so we are looking at attrition to streamline staffing.
Action: Upon a motion by Councilmember Emery and a second by Councilmember Dale, the Transportation Committee received this report for information.

9. UPCOMING MEETINGS

The next meetings of the Transportation Committee are scheduled for May 7, 2004 and May 21, 2004.

Mr. Pahlke noted that the Board Room will be under construction so the May 21 Transportation Committee meeting will be in another location.

10. ADJOURNMENT

Chair Kellejian adjourned the meeting at 10:43 a.m.

Attachment
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May 7, 2004

AGENDA ITEM NO.: 3

Action Requested: APPROVE

METROPOLITAN TRANSIT SYSTEM (MTS) ROUTE 11
BUS STOP CONSOLIDATION DEMONSTRATION PROJECT

Introduction

Various transit passenger and resident surveys conducted over the past several years consistently reveal that two of the most important factors in a person's decision to take transit are travel speed and service reliability. However, a number of factors, including growing traffic congestion in our region and bus stops spaced too closely together, have impacted our transit system's ability to maintain speeds and ensure reliability. Currently, the average speed of Metropolitan Transit System (MTS) buses is approximately 12 mph and the general system on-time performance ranges between 75 and 87 percent. Since 1999, MTS operators have spent over $3 million to maintain the frequency and reliability of the existing services that are slowed by growing congestion. These costs come from the need to add resources (vehicles and drivers) to provide the scheduled level of service. These resources would be more productively spent on enhanced and new transit services.

To try to address the need to improve transit speed and reliability, SANDAG and San Diego Transit Corporation (SDTC) jointly implemented a Bus Stop Consolidation Demonstration Project on bus Route 11 in January 2004 to determine if bus stop reductions would be a cost-effective way to enhance transit reliability and speed up the service. The demonstration is rooted in the regional Transit First implementation strategy that strives to make transit a first choice for many trips by making it more competitive with the automobile.

Recommendation

It is recommended that the SANDAG Transportation Committee receive this report and authorize staff to continue the bus stop consolidation program, in partnership with the transit agencies and operators, on other routes as appropriate. The results of this program would be reported to the Transportation Committee on a regular basis.

Discussion

Successful bus service needs to balance speed with access. Although placing more bus stops along a route may improve access, too many bus stops can negatively impact the quality of service, travel time, reliability, and efficiency of the service. Therefore, bus stops should be strategically placed to maximize access, while the number of stops along a route should reflect goals to achieve faster operating speeds, maintain reliability, and improve service to our riders.
To test the balance between access and speed, SANDAG and SDTC collaborated to implement the Route 11 Bus Stop Consolidation Demonstration. Route 11 serves the College, Mid-City, Hillcrest, downtown San Diego, southeastern San Diego, and Spring Valley communities and carries just under three million passengers a year (Attachment 1). Its ability to operate efficiently has been hindered by frequent stop spacing and by stops that are placed in inappropriate locations (Attachment 2). As a result, the route continually experiences bunching and is often late. SDTC had little success in correcting these problems with extra trips and frequency increases. Unreliable service, combined with the length of the route and slow travel speeds, has resulted in long trip times for riders.

The Route 11 Bus Stop Consolidation Demonstration Project removed or consolidated 29 of the 233 stops along the route. In addition to temporarily decommissioning the identified stops, this effort included an extensive outreach campaign to affected communities. Staff from San Diego City Council Districts 3 and 4 were briefed on the project and provided status reports throughout a three-month demonstration period. Letters were sent to all community planning groups along the route alignment alerting them of the stop consolidation program. Passengers were notified in advance via Take One notices onboard buses that explained the purpose of the project and the associated bus stop closures. In addition, information was posted two weeks in advance at the affected stop locations informing customers of the proposed closure, as well as providing a hotline number in the event that the proposed closure created a hardship. Comment was received for a three-month period.

Project Monitoring and Evaluation

SANDAG gathered data to complete a “before and after” comparison of ridership, travel time, on-time performance, and driver and passenger perceptions. The evaluation during this monitoring period included passenger counts, on-time performance checks, hearing and responding to customer compliments and concerns, and interviews with bus operators as to their perception and experience with the program. The stop consolidation did not target the entire Route 11; the primary stop consolidation occurred in the southeast and Kensington communities. Although consolidation of a larger number of stops would have produced more significant findings, the results are encouraging. Results have been evaluated relative to customer and driver impacts as well as time savings and schedule adherence.

Ridership Impacts

During the monitoring period, three stops were reinstated based on rider comments and concerns, resulting in 26 stops removed for the duration of the demonstration project. Of a total of 42 comments, which is less than 1/2% of the total daily ridership on the route, 20 were related to stops that were subsequently reinstated, six were general inquiries regarding the project, three were in full support of the project, and 13 were for other stop concerns, which have been addressed.

Based on farebox counts, Route 11 ridership increased almost 9% from January 2004 (before the demonstration) to March 2004. While we would expect a positive seasonal fluctuation in ridership during this period (winter to spring), this increase compares favorably to an approximate 5% ridership increase on the route from January 2003 to March 2003. To more clearly understand ridership impacts associated with the removal or consolidation of 26 stops, SANDAG and SDTC staff also conducted a series of onboard passenger counts before and after the stop consolidation.
Counts were conducted during morning peak, midday, and evening peak travel periods. These limited surveys imply ridership along the route increased 18% between January 2004 and March 2004. Both sets of data indicate that ridership was not negatively impacted by the stop consolidation and, in fact, may have been positively impacted.

Bus Driver Comments

The passenger counting also provided an opportunity to solicit feedback from Route 11 bus drivers. Positive comment was received from all interviews conducted with the drivers, generally typified as: “The route ran smoother, and it wasn’t as much of a struggle to make the schedule; it seemed to save 5 minutes per trip; passengers seem to be adjusting and using other stops with no negative comment.”

On-Time Performance Improvement

Based on SDTC Route 11 summary reports, the on-time performance of Route 11 during February and March 2003 was 76 percent, compared to an 85 percent on-time performance for February and March 2004, after the stop consolidation. This performance improvement cannot be solely attributable to stop consolidation since schedule adjustments were made to Route 11 in September 2003, and may have contributed to the on-time performance improvement. However, the schedule adjustments appeared to have resulted in minor improvements from September to December 2003. Therefore, stop consolidation, in combination with other strategies, appears to be an effective tool in improving the on-time performance of bus routes.

Systemwide Impacts

It takes a typical bus roughly 10 seconds to decelerate, stop at a bus stop, open the bus door, and then accelerate back to the standard operating speed, and it takes between 3 and 7 seconds for a passenger to board or alight. Based on the average stop activity on Route 11, a very conservative estimate of time delay per stop is between 13 and 17 seconds. Based on this assumption, and the number of stops consolidated along the route, the total time savings per round trip is roughly 3 minutes and 30 seconds. If this time savings is achieved on each of the 74 round trips per day, Route 11 would save roughly four hours per day in travel time. More significantly, if this time savings is achieved over the course of a year (255 weekdays), the route would save an estimated 1,100 operating weekday hours annually. This time savings could equate to a net savings of roughly $30,000 annually. Given that these results can be achieved by removing only 26 stops along one route, bus stop consolidation implemented systemwide has the potential for greater improvements to travel time and reliability at a financial savings and at no cost to transit operations.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments

Key Staff Contact: Mike Daney, (619) 557-4541; mike.daney@sdmts.com
Route 11 Bus Stop Consolidation Demonstration
2004 STATE TRANSPORTATION IMPROVEMENT PROGRAM (STIP) - REVISED SUBMITTAL

Introduction

On March 26, 2004, the Board of Directors approved submittal of Option C of the 2004 State Transportation Improvement Program (STIP) which maximizes the use of Grant Anticipation Revenue Vehicle (GARVEE) and other bonds. Early feedback from the California Transportation Commission (CTC) indicates that it will not make a decision on which projects will be financed with GARVEE bonds until after the statewide STIP is adopted on August 5, 2004. CTC staff is requesting submittal of a “pay as you go” STIP proposal that does not include GARVEE or other bond financing. Potential programming actions for three projects that are ready to go to construction in the near-term are discussed as well.

Recommendation

It is recommended that Option A of the 2004 STIP alternatives, which does not include any additional bond financing, be presented to the SANDAG Board of Directors for approval so it may be submitted to the CTC. It is further recommended that in order to minimize potential project delays and cost increases, staff continue to pursue bond financing as outlined under Option C.

Discussion

On March 26, 2004, the SANDAG Board of Directors approved Option C of the Draft 2004 STIP proposal that included approximately $253 million in GARVEE bonds and $80 million in North County Transit District (NCTD) bond financing for the Sprinter (see Attachment 1 for comparison of Option A to the preferred Option C). The CTC has indicated, however, that it will not begin to make a determination of which projects will be financed with GARVEE bonds until September 2004. A regional “pay as you go” STIP proposal that does not contain any bond financing, therefore, needs to be submitted to the CTC.

Option A

Option A, a “pay as you go” STIP programming alternative that does not include any additional bond financing beyond that already approved for the Interstate 15 (I-15) Managed Lanes, was developed as part of the set of alternatives presented to the Transportation Committee for its review and discussion beginning in February 2004. Details for Option A are shown in Attachment 2. It proposes to program the available funds on the existing STIP projects; however, it does not fully fund all of them. Nearly $300 million dollars in budget gaps remain with Option A, of which approximately $77 million correspond to ongoing construction, acquisition, and procurement Traffic Congestion Relief Program (TCRP) contracts (see Attachment 3). Although the Schwarzenegger
Administration has proposed terminating the TCRP program, the Legislature has not taken formal action. Therefore, TCRP expenditures are continuing and the $77 million figure is expected to decrease, at least during the remainder of the current fiscal year. Staff continues to monitor legislative action regarding the TCRP, and will recommend specific action once proposals are approved.

Option A is a “pay as you go” alternative, which relies on the availability of STIP funds on a year-by-year basis and programs the funds accordingly. The CTC shifted the available funds that remained from the 2002 STIP and spread them farther into the last years of the new 2004 STIP cycle (FY 2007/08 and FY 2008/09). See Figure 1 below for a graphical representation. As a result of this shift in fund availability, project delays will occur. Project specific delays are shown in more detail in Attachment 2.

It should be noted that the GARVEE bonds for the I-15 Managed Lanes have already been approved and are not impacted by approval of Option A. The I-15 Managed Lanes bonds have been sold and the proceeds received. The project is continuing under construction, as scheduled.

Other Considerations

As mentioned above, nearly $300 million in budget gaps remain with Option A, of which approximately $77 million correspond to authorized TCRP funds currently being expended but which are subject to potential termination legislation. The $77 million will continue to shrink until the funds are expended or legislation is approved that would terminate the program. The remaining $223 million budget gap corresponds to various projects as shown on Attachment 3, including State Route (SR) 52 construction, and the Sprinter.

Table 1 below shows how Option A is different from Option C after both the available STIP and TCRP funds have been applied to the overall transportation project funding needs.
TABLE 1.— COMPARISON OF OPTION A VS. OPTION C

<table>
<thead>
<tr>
<th>ITEM</th>
<th>OPTION A - NO ADDITIONAL GARVEE BONDS ($000'S)</th>
<th>OPTION C - MAXIMIZE GARVEE BONDS ($000'S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Initial need to complete the 2002 STIP projects</td>
<td>$423,806</td>
</tr>
<tr>
<td>b.</td>
<td>Delay Costs</td>
<td>$79,855</td>
</tr>
<tr>
<td>c.</td>
<td>Financing Costs</td>
<td>$0</td>
</tr>
<tr>
<td>d.</td>
<td>Need through 2004 STIP period (FY 2005-09)</td>
<td>$503,661</td>
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<tr>
<td>e.</td>
<td>TCRP Funds on ongoing Construction and Procurement Contracts*</td>
<td>$77,132</td>
</tr>
<tr>
<td>f.</td>
<td>Revised Need (d minus e)</td>
<td>$426,529</td>
</tr>
<tr>
<td>g.</td>
<td>2004 STIP Funds Available</td>
<td>$203,849</td>
</tr>
<tr>
<td>h.</td>
<td>Budget Gap (f minus g)</td>
<td>$222,680</td>
</tr>
<tr>
<td>i.</td>
<td>Additional Revenues through FY 2005-2009:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plan to Bridge Budget Gap</td>
<td></td>
</tr>
<tr>
<td>j.</td>
<td>Option A: RSTP/CMAQ/Other funds</td>
<td>$222,680</td>
</tr>
<tr>
<td>k.</td>
<td>Option C: GARVEE/Other Bonds</td>
<td>$0</td>
</tr>
</tbody>
</table>

*Approximately $17.5 million were added to this figure from the $57.5 million shown in the March 26 report to account for SR 905 funds that were originally counted as not available but which have since been made available for right of way acquisitions through June 30, 2004.

Option A follows a “pay as you go” approach with STIP funds and does not include additional GARVEE bonds. Although the reduced delay costs in Option C are offset by the financing costs, an additional benefit to commuters and travelers of Option C over Option A is from having several major transportation facilities completed years earlier, including SR 52 and SR 905, as shown in Attachment 1.

Under Option A, the $222.7 million budget gap could be addressed by RSTP, Congestion Mitigation and Air Quality (CMAQ) or other funds. Staff is not recommending any programming actions at this time, pending the outcome of the GARVEE bond discussions with the CTC.

There are three projects, however, that are or will be ready to go to construction in the near term that will need alternative funding if the CTC does not concur with the GARVEE bond financing that the Board approved for submittal at its March 26 meeting.

SR 905

Regional STIP funding for SR 905 under Option A would not be available until FY 2007/08. Caltrans has offered to make its interregional share of the STIP available in FY 2005/06. One option to accelerate the availability of the regional STIP funds would be to delay the acquisition of right-of-way for SR 52 by one year and program the regional STIP funds in FY 2005/06. However, staff considers the prospects for SR 905 to be selected for GARVEE bond financing to be high given its status as a gateway of state, national, and international significance for goods movement, which is one of the CTC’s stated key criteria. Programming STIP funds on right-of-way acquisition for SR 52, therefore, makes more sense as GARVEE bond financing is more likely to be approved for SR 905. If...
the CTC fails to select SR 905 for GARVEE bond financing as was originally proposed under Option C, however, the region may need to program Regional Surface Transportation Program (RSTP) funds in FY 2005/06 to meet the state’s proposal to program its interregional share of the STIP in that year. Approximately $24 million is needed in FY 2005/06. Staff will inform the Transportation Committee as more details become available.

**SR 56 Landscaping**

The design of this project is currently scheduled to be complete in fall 2004. If the CTC does not approve GARVEE bond financing for other larger projects, STIP programming capacity for this $3.4 million project will not be freed up and other funds will be required to award this project. This project is required as mitigation under the California Coastal Commission’s permit. Since this project was covered only under the California Environmental Quality Act (CEQA) and federal clearance under the National Environmental Protection Act (NEPA) was not obtained, it does not qualify for federal funds. This would likely require a future exchange of funds with other project or projects that have local funds as federal funds would not be eligible. Staff will inform the Transportation Committee as more details become available.

**Sprinter**

This project has $80 million in unallocated TCRP funds that are currently not available due to the current suspension on new TCRP allocations. The design has been completed and NCTD is ready to award this construction contract. As discussed and approved by the SANDAG Board at its March 26, 2004 meeting, Option C includes using STIP funds to back an NCTD-issued bond to temporarily replace the $80 million in TCRP funds. If the CTC does not approve the use of STIP funds for this bond, however, NCTD would still issue the bond and cover the interest payments only through FY 2007 while negotiations continue to have the state honor its $80 million commitment. The region would begin repayment of the principal using unprogrammed CMAQ funds, estimated at approximately $10.5 million per year over a ten-year period. This alternative funding concept was approved by the Board at its March 26, 2004, meeting. A Memorandum of Understanding (MOU) which includes the use of these CMAQ funds was approved by the SANDAG Board of Directors at its April 23 meeting.

**Next Steps**

A preliminary draft of Option A has been submitted to the CTC to meet its timeline with the qualification that it is pending approval by the SANDAG Board of Directors. Pending the Transportation Committee’s action, a recommendation for approval of Option A will be taken to the SANDAG Board of Directors at its May 28, 2004, meeting. A formal submission of the 2004 STIP to the CTC will be made at that time.

**RENÉE WASMUND**  
Director of Finance

**Attachments**

Key Staff Contact: José A. Nuncio, (619) 699-1908; jnu@sandag.org
<table>
<thead>
<tr>
<th>Item Description</th>
<th>Phase</th>
<th>STIP Option A Additional GARVEE</th>
<th>STIP Option C Maximize GARVEE</th>
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<tr>
<td></td>
<td></td>
<td>Proposed Amount ($000’s)</td>
<td>Year of Completion</td>
</tr>
<tr>
<td><strong>2004 STIP Program Proposals</strong></td>
<td></td>
<td>Proposed Amount ($000’s)</td>
<td>Year of Completion</td>
</tr>
<tr>
<td><strong>Remaining 2002 STIP Projects</strong></td>
<td></td>
<td>Proposed Amount ($000’s)</td>
<td>Year of Completion</td>
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<tr>
<td>1 SR 52 Freeway Right of Way</td>
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<td>2008</td>
<td>25,961</td>
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<td>2 SR 52 Freeway Construction</td>
<td>68,920</td>
<td>2011</td>
<td>36,702</td>
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<tr>
<td>3 SR 905 Freeway Construction</td>
<td>23,866</td>
<td>2010</td>
<td>21,528</td>
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<tr>
<td>4 SR 54/SR 125, from I-805 to SR 94, HOV lanes Design</td>
<td>6,500</td>
<td>2009</td>
<td>6,500</td>
</tr>
<tr>
<td>5 Regional automated fare system Implementation</td>
<td>19,500</td>
<td>2005</td>
<td>19,500</td>
</tr>
<tr>
<td>6 Oceanside parking structure Construction</td>
<td>0</td>
<td>2005</td>
<td>0</td>
</tr>
<tr>
<td>7 Mid-Coast Balboa extension Right of Way acquisition Right of Way</td>
<td>9,254</td>
<td>2008</td>
<td>47,599</td>
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<tr>
<td>8 1-5/Del Mar Hts to Via de la Valley, NB auxiliary lane Construction</td>
<td>0</td>
<td>2004</td>
<td>0</td>
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<tr>
<td>9 TMS: changeable message signs Construction</td>
<td>1,060</td>
<td>2007</td>
<td>1,060</td>
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<tr>
<td>10 TMS: monitoring stations, pullouts Construction</td>
<td>6,050</td>
<td>2010</td>
<td>6,050</td>
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<tr>
<td>11 TMS: ramp meters Construction</td>
<td>7,163</td>
<td>2010</td>
<td>7,163</td>
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<tr>
<td>12 Rideshare TDM program Implementation</td>
<td>9,168</td>
<td>Continuous</td>
<td>9,168</td>
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<tr>
<td>13 Planning, programming, and monitoring Implementation</td>
<td>2,121</td>
<td>Continuous</td>
<td>2,121</td>
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<td>14 RSTP/CMAQ/TEA match reserve Construction</td>
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<td>Various</td>
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<td><strong>Other Projects Not Included in Remaining 2002 STIP</strong></td>
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<td>A I-15 Managed Lanes Freeway Elements** Construction</td>
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<td>E East Village Transit Stations Construction</td>
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<td>2005*</td>
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<tr>
<td>F MTS Buses Procurement</td>
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<td>2005*</td>
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<tr>
<td>G I-5/I-805 &quot;Merge* Construction</td>
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<td>2007*</td>
<td>0</td>
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<tr>
<td>H SR 56 &quot;Middle&quot; Freeway Construction</td>
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<td>2004*</td>
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<td><strong>Total (Projects 1-14 and A-H)</strong></td>
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<td>203,849</td>
</tr>
</tbody>
</table>

* These on-going construction and procurement projects have TCRP funds at risk. The projects will proceed through construction as currently scheduled. There may be Delay Costs associated with redirecting funds from other projects if it becomes necessary to backfill the TCRP funds.

** As compared with the 2002 STIP Programmed Schedule

* I-15 Managed Lanes was included in the January 16, 2004 report as needing $12 million. The CTC has included this amount as part their approved GARVEE bond financing and is no longer needed.
<table>
<thead>
<tr>
<th>Ref</th>
<th>Option</th>
<th>FY 05</th>
<th>FY 06</th>
<th>FY 07</th>
<th>FY 08</th>
<th>FY 09</th>
<th>Baseline Program</th>
<th>Delay Period (Years)</th>
<th>Delay Cost</th>
<th>2004 STIP Option A Program</th>
<th>Environmental and Design</th>
<th>Right of Way</th>
<th>Construction</th>
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<tr>
<td>1</td>
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<td>4</td>
<td>SR 54/SR 15, from I-805 to SR 94, HOV lanes</td>
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<td></td>
<td></td>
<td>6,500</td>
<td>6,500</td>
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<td>0</td>
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<td>6,500</td>
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<tr>
<td>5</td>
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<td>9,750</td>
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<tr>
<td>7</td>
<td>Mid-Coast Balboa extension</td>
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<td>1,060</td>
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<td>0</td>
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<td>1,060</td>
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<tr>
<td>9</td>
<td>TMS: changeable message signs</td>
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<td></td>
<td></td>
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<tr>
<td>10</td>
<td>TMS: monitoring stations, pullouts</td>
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<td>334</td>
<td>785</td>
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<td>0</td>
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<td>627</td>
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<tr>
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<td>RSTP/CMAQ match reserve</td>
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<td></td>
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<td>7,412</td>
<td>39,984</td>
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<td>203,849</td>
<td>15,720</td>
<td>54,438</td>
<td>133,691</td>
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</table>

Sub-Total "Existing" | 4,133 | 39,984 | 33,825 | 92,797 | 203,849 | 2,414 | 2,414 | 203,849 | 15,720 | 54,438 | 133,691 |

Target | (3,279) | 0 | 58 | 1,817 | 1,404 | 0 | 0 | 0 | 0 | 0 | 0 |

SANDAG share of inflation cost. Region would work with Caltrans to cover their share of construction cost escalation.
# Funding Gaps not Funded under Option A

## Other High Priority Projects with Funding Gaps not included in Option A

<table>
<thead>
<tr>
<th>Ref</th>
<th>Description</th>
<th>FY 05</th>
<th>FY 06</th>
<th>FY 07</th>
<th>FY 08</th>
<th>FY 09</th>
<th>Current Shortfall</th>
<th>Delay Period (Years)</th>
<th>Delay Cost</th>
<th>2004 STIP Option A Shortfall</th>
<th>Environmental and Design</th>
<th>Right of Way</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
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<td>2</td>
<td>SR 52 Construction - Remaining Need¹</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>79,924</td>
<td>71,380</td>
<td>2</td>
<td>8,544</td>
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<td></td>
<td>Mid Coast Balboa Extension</td>
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<td>19,590</td>
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<td>B</td>
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<td>24,507</td>
<td>23,100</td>
<td>2</td>
<td>1,407</td>
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<td>24,507</td>
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<td>C</td>
<td>Sprinter¹</td>
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<td>2</td>
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<td>SR 56 Landscaping Required Mitigation¹</td>
<td>3,607</td>
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<td>3,607</td>
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## Potential TCRP Funding Gaps not addressed at this time

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<th>FY 05</th>
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<th>FY 07</th>
<th>FY 08</th>
<th>FY 09</th>
<th>Current Shortfall</th>
<th>Delay Period (Years)</th>
<th>Delay Cost</th>
<th>2004 STIP Option A Shortfall</th>
<th>Environmental and Design</th>
<th>Right of Way</th>
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<td></td>
<td></td>
<td></td>
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<td>19,640</td>
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<td>13,988</td>
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<td>F</td>
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<td>18,848</td>
<td></td>
<td></td>
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<td></td>
<td>17,766</td>
<td>*</td>
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<tr>
<td>G</td>
<td>I-5/I-805 &quot;Merge&quot;</td>
<td>17,032</td>
<td></td>
<td></td>
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<td></td>
<td>16,054</td>
<td>*</td>
<td>978</td>
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<td>H</td>
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<td></td>
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<td>6,384</td>
<td>*</td>
<td>389</td>
<td>6,773</td>
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<td></td>
<td>Sub-Total Non-STIP Sources</td>
<td>77,132</td>
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<td>0</td>
<td>0</td>
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<td>5,490</td>
<td>77,132</td>
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</tr>
</tbody>
</table>

¹ Shortfall amounts are TCRP funds at risk. Projects will proceed through construction as currently scheduled. The Delay Cost is the estimated cost associated with redirecting funds from other projects if it becomes necessary to backfill the TCRP funds.

1. Indicates TCRP suspension contributed to funding gap
2. Delay costs correspond to potential contract suspension costs for two years until next STIP cycle adds new funds.
3. Caltrans is currently spending down $17.45 million in TCRP, they anticipate making offers for early acquisition by Jun 30, 2004

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TCRP funds at risk on ongoing construction, acquisition and procurement contracts

Total remaining budget gap under Option A

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Total remaining budget gap under Option A

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TCRP funds at risk on ongoing construction, acquisition and procurement contracts
INTERSTATES 805/5 CORRIDOR STUDY ALTERNATIVES SCREENING

Introduction

SANDAG, in partnership with Caltrans, is developing a transportation improvement strategy to enhance the mobility of interregional and regional trips for the entire Interstate 805 (I-805) corridor and the Interstate 5 (I-5) corridor south of State Route (SR) 54.

The purpose of the I-805/I-5 Corridor Study aligns with the overall goals of the 2030 Regional Transportation Plan (RTP), MOBILITY 2030. The study objectives, as defined in its Need and Purpose Statement, are to:

- Increase capacity to move people and goods within the study area;
- Provide travel choices for regional trips that include transit, carpools, and vanpools, with travel times to major job centers competitive with driving alone;
- Sustain current travel times in mixed-use lanes in 2030, including goods movement-related trips; and
- Achieve a minimum 10 percent transit mode share and 12 percent carpool mode share for peak-period work trips in 2030 in the study area.

Eight multimodal transportation alternatives were developed to address the issues and needs identified by the study’s Technical Working Group. Each alternative includes different levels of regional transit service and highway improvements. In addition, the alternatives include different types of main lane highway improvements, such as high-occupancy-vehicle (HOV) lanes, Managed Lanes, and mixed-flow lanes.

An evaluation of the eight alternatives was conducted to determine which ones better meet the study’s Need and Purpose. This evaluation was discussed by the Technical Working Group at its meeting in April. Three Open Houses were held the week of April 12 to provide information to the general public and solicit their input on the alternatives analyzed. About 50 people attended the Open Houses in Chula Vista and the communities of City Heights and University City in the City of San Diego.

Recommendation

SANDAG staff recommends approval of four of the eight transportation alternatives for further evaluation. The I-805/I-5 Corridor Study Technical Working Group concurs with this recommendation. In addition to the No Build scenario (Alternative 1), the three Build alternatives recommended for additional study are: Alternative 3, MOBILITY 2030 Transit and Highway; Alternative 5, Enhanced Transit and MOBILITY 2030 Highway; and Alternative 6, MOBILITY 2030 Transit and Enhanced Highway (see discussion below).
Discussion

Alternatives Evaluated

The transportation alternatives evaluated in the I-805/I-5 study are multimodal in nature. Alternatives 3, 5, and 6 implement the regional transit and highway improvements adopted in MOBILITY 2030, resulting in an integrated transit and Managed Lanes network. The regional transit system and the Managed Lanes network provide choices and alternatives to solo driving.

Alternative 3 is essentially the MOBILITY 2030 network. Alternative 5 would provide enhanced transit services in the South Bay and Mid-Coast areas beyond MOBILITY 2030, while Alternative 6 would provide two additional mixed-flow lanes on I-805 from Telegraph Canyon Road, in Chula Vista, to the I-805/I-5 merge.

Alternative 1 (No Build) is used for comparison purposes with the build alternatives. A No Build alternative also must be evaluated in subsequent environmental analyses.

The eight transportation scenarios analyzed are outlined below. Attachment 1 describes the improvements proposed for each alternative in more detail.

- **Alternative 1:** No Build – Baseline transit service and no improvements to I-805 and I-5 South.
- **Alternative 2:** Limited Transit and Limited Highway – Limited regional transit service and limited high-occupancy-vehicle lane (HOV) improvements.
- **Alternative 3:** MOBILITY 2030 Transit and Highway – MOBILITY 2030 regional transit service and HOV improvements.
- **Alternative 4:** Limited Transit and HOV/Mixed-Flow Highway – Limited regional transit service and HOV/mixed-flow lanes.
- **Alternative 5:** Enhanced Transit and MOBILITY 2030 Highway – Enhanced regional transit service (additional South Bay and Mid-Coast routes) and MOBILITY 2030 HOV improvements.
- **Alternative 6:** MOBILITY 2030 Transit and Enhanced Highway – MOBILITY 2030 regional transit service and highway with additional I-805 mixed-flow lanes and HOV connectors.
- **Alternative 7:** MOBILITY 2030 Transit and Toll Highway – MOBILITY 2030 regional transit service and toll lane highway improvements (transit toll free).
- **Alternative 8:** Baseline Transit and Unlimited Highway – Baseline transit service and unlimited mixed-flow lane highway improvements to achieve Level of Service (LOS) E at peak hour.
The alternatives are generally based on various combinations of the three revenue scenarios in MOBILITY 2030: Revenue Constrained, Reasonably Expected (the basis for MOBILITY 2030), and Unconstrained Revenue, as shown below.

<table>
<thead>
<tr>
<th>I-805/I-5 Corridor Study: Level of Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limited</td>
</tr>
<tr>
<td>MOBILITY 2030</td>
</tr>
<tr>
<td>Enhanced</td>
</tr>
<tr>
<td>Revenue Constrained</td>
</tr>
<tr>
<td>Reasonably Expected</td>
</tr>
<tr>
<td>Unconstrained Revenue</td>
</tr>
</tbody>
</table>

Summary of Findings

Of the eight alternatives evaluated, four are recommended for further study. In addition to the No Build scenario (Alternative 1), the three Build alternatives recommended for additional study are Alternatives 3, 5, and 6 (Attachments 2 through 5). The evaluation of these alternatives showed that the combination of transit and highway improvements proposed would best meet the Need and Purpose of the study.

To conduct the initial screening of alternatives, a set of quantitative measures was developed to capture the performance of each transportation alternative regardless of travel mode. A qualitative analysis also was conducted. Attachment 6 summarizes the evaluation of the alternatives and the screening results.

Within the study area, Alternatives 3, 5, and 6 best address mobility by increasing capacity to move people and goods, support reliability by providing the highest travel time savings, and provide for congestion relief by substantially reducing (but not eliminating) Level of Service (LOS) F during the peak hour. Finally, these three improvement scenarios provide alternative travel choices for regional trips and achieve the highest transit and carpool usage for work trips during the peak periods.

Alternatives 3, 5, and 6 improve LOS on I-805 segments identified as deficient (LOS F) in the 2002 Congestion Management Program (CMP), including Bonita Road to SR 54, and Market Street to El Cajon Boulevard. Additionally, Alternative 6 improves the deficient segment on I-805 between Nobel Drive and La Jolla Village Drive.

In terms of regional goals, the three alternatives support the reliability goal by reducing congested travel conditions and encourage the integration of land use and transportation policies by proposing convenient transit services nearby homes and jobs. Alternatives 3, 5, and 6 also address the equity goal by affording slightly higher accessibility for work trips for minority and low-income populations.
Next Steps

Following the Transportation Committee’s action on the screening of alternatives, key tasks to be performed include refining the travel forecasts, conducting an environmental constraints analysis, and enhancing the set of performance measures to evaluate the remaining alternatives in preparation for a recommended transportation improvement strategy for the study corridor. The Transportation Committee will be asked to take action on the recommended strategy in Fall 2004.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments

Key Staff Contact: Elisa Arias, (619) 699-1936; ear@sandag.org
Description of Alternatives Evaluated

Alternative 1: No Build
The No Build alternative (Alternative 1) generally represents current transit service and no improvements to I-805 and I-5 South. The No Build scenario assumes completion of the Mission Valley East and Mid-Coast to Balboa light rail transit extensions, the I-5 auxiliary lane between Bay Marina Drive and Harbor Drive, interchange improvements at I-805 and Olympic Parkway, the I-5 HOV connector at the I-805 merge, and the San Ysidro Port of Entry realignment.

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Alternative 2: Limited Transit and Limited Highway¹
Limited Regional Transit Service and limited HOV improvements

Regional and Corridor Transit Services

<table>
<thead>
<tr>
<th>Heavy Rail</th>
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</thead>
<tbody>
<tr>
<td>Route 398: Increase in Coaster service from 36 min. to 20 min. headways in peak period</td>
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<table>
<thead>
<tr>
<th>Light Rail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak</td>
</tr>
<tr>
<td>Route 570: New Mid-Coast to Balboa with 7.5 min headways in peak period</td>
</tr>
</tbody>
</table>

New Bus Rapid Transit

| Route 628: Centre City to Otay Mesa via SR 94/I-805 with 10 min. service in peak period |

HOV and Managed Lane Facilities

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>After Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-805</td>
<td>SR 905</td>
<td>SR 54</td>
<td>8F</td>
<td>8F + 2 HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 54</td>
<td>I-8</td>
<td>8F</td>
<td>8F + 4ML</td>
</tr>
<tr>
<td>I-805</td>
<td>Mission Valley Viaduct</td>
<td></td>
<td>8F</td>
<td>8F + 4ML</td>
</tr>
<tr>
<td>I-805</td>
<td>I-8</td>
<td>I-5</td>
<td>8F</td>
<td>8F + 4ML</td>
</tr>
</tbody>
</table>

Direct Access Ramps

<table>
<thead>
<tr>
<th>Freeway</th>
<th>Arterial</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-805</td>
<td>E. Palomar Street</td>
</tr>
</tbody>
</table>

¹The I-5 HOV Connector (at the I-805 merge) and the I-5/I-805 Port of Entry (Inspection Facility) are assumed in all alternatives. The 2030 RTP Mobility Network is assumed outside the study area.
Alternative 3: MOBILITY 2030 Transit and Highway¹

MOBILITY 2030 Regional Transit Service and HOV improvements

### Regional and Corridor Transit Services

**Heavy Rail**

Route 398: Increase in Coaster service from 36 min. to 20 min. headways in peak period (Tunnel at UTC)

**Light Rail**

Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak

Route 570: New Mid-Coast to Balboa, to UTC, and to Sorrento Mesa with 7.5 min headways in peak period

**New Bus Rapid Transit**

Route 619: 32nd Street to Clairemont Mesa with 5 min. headways in peak period

Route 621: Centre City to Fashion Valley and UTC via Hillcrest/Genesee Avenue with 5 min. headways in peak period

Route 627: H Street to Otay Ranch via Southwestern College with 30 min. headways in peak period

Route 628: Centre City to Otay Mesa via SR 94/I-805 with 5 min. headways in peak period

Route 660: El Cajon to UTC via SR 52 with 10 min. headways in peak period

Route 680: San Ysidro to Sorrento with 5 min. headways in peak period

### HOV and Managed Lane Facilities

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>After Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-5</td>
<td>SR 905</td>
<td>SR 54</td>
<td>8F</td>
<td>8F + 2HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 905</td>
<td>SR 54</td>
<td>8F</td>
<td>8F + 4ML</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 54</td>
<td>I-8</td>
<td>8F</td>
<td>8F + 4ML</td>
</tr>
<tr>
<td>I-805</td>
<td>Mission Valley Viaduct</td>
<td></td>
<td>8F</td>
<td>8F + 4ML</td>
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<tr>
<td>I-805</td>
<td>I-8</td>
<td>I-5</td>
<td>8F</td>
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</tr>
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### Direct Access Ramps

<table>
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<th>Arterial</th>
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<td>I-805</td>
<td>E. Palomar Street</td>
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### HOV Connectors

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<tr>
<th>Freeway</th>
<th>Intersecting Freeway</th>
<th>Movement</th>
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<tr>
<td>I-805</td>
<td>SR 52</td>
<td>West to North &amp; South to East</td>
</tr>
</tbody>
</table>

F = Freeway Lanes
ML = Managed Lanes (HOV & Value Pricing)
HOV = High Occupancy Vehicle Lanes

¹The I-5 HOV Connector (at the I-805 merge) and the I-5/I-805 Port of Entry (Inspection Facility) are assumed in all alternatives. The 2030 RTP Mobility Network is assumed outside the study area.
Alternative 4: Limited Transit and HOV/Mixed Flow Highway¹
Limited Regional Transit Service and HOV/Mixed Flow Lanes

Regional and Corridor Transit Services

Heavy Rail
Route 398: Increase in Coaster service from 36 min. to 20 min. headways in peak period

Light Rail
Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak
Route 570: New Mid-Coast to Balboa with 7.5 min headways in peak period

New Bus Rapid Transit
Route 628: Centre City to Otay Mesa via SR 94/I-805 with 10 min. service in peak period

Highway and HOV Lane Facilities

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>After Improvements</th>
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<tbody>
<tr>
<td>I-5</td>
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<td>SR 54</td>
<td>8F</td>
<td>8F + 2HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 905</td>
<td>Telegraph Canyon</td>
<td>8F</td>
<td>10F + 2HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>Telegraph Canyon</td>
<td>I-8</td>
<td>8F</td>
<td>10F + 2HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>Mission Valley Viaduct</td>
<td>I-5</td>
<td>8F</td>
<td>10F + 2HOV</td>
</tr>
<tr>
<td>I-805</td>
<td>I-8</td>
<td>I-5</td>
<td>8F</td>
<td>10F + 2 HOV</td>
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Direct Access Ramps

<table>
<thead>
<tr>
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</tr>
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<tbody>
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Alternative 5: Enhanced Transit and MOBILITY 2030 Highway¹
Enhanced Regional Transit Service (additional South Bay and Mid-Coast routes) and MOBILITY 2030 HOV improvements

Regional and Corridor Transit Services

Heavy Rail
Route 398: Increase in Coaster service from 36 min. to 30 min. headways in peak period (Tunnel at UTC)

Light Rail
Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak
Route 570: New Mid-Coast to Balboa with 10 min headways in peak period

Bus Rapid Transit
Route 480: Vista to UTC via College/I-5 with 10 min. headways in peak period
Route 616: Pt. Loma to Mira Mesa via Black Mtn & Linda Vista with 5 min. headways in peak period
Route 619: 32nd Street to Sorrento Mesa via I-15 Clairemont Mesa with 5 min. headways in peak period
Route 621: Centre City to Fashion Valley and UTC via Hillcrest/Genesee Avenue with 5 min. headways in peak period
Route 624: University Avenue with 5 min. headways in peak period
Route 625: Imperial Beach to Otay Mesa via SR 905 with 10 min. headways in peak period
Route 626: National City to Iris Station via 3rd/4th with 10 min. headways in peak period
Route 627: H Street Trolley to Otay Ranch via Southwestern College with 10 min. headways in peak period
Route 628: Centre City to Otay Mesa via SR 94/I-805 with 5 min. headways in peak period
Route 630: Old Town to Grossmont Center via El Cajon Blvd. with 10 min. headways in peak period
Route 631: 8th Street National City to Plaza Bonita via SR 54 with 10 min. headways in peak period
Route 632: Balboa Station to UTC via La Jolla with 10 min. headways in peak period
Route 634: Super Loop with 10 min. headways in peak period
Route 635: Main Street to Eastlake via Otay Ranch with 10 min. headways in peak period
Route 640: San Ysidro to Old Town via I-5/Pacific Highway with 10 min. headways in peak period
Route 660: El Cajon to UTC via SR 52 with 10 min. headways in peak period
Route 670: El Cajon to San Ysidro via I-805/SR 125/SR 54 with 10 min. headways in peak period
Route 680: San Ysidro to Sorrento with 5 min. headways in peak period

HOV and Managed Lane Facilities

<table>
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<th>Freeway</th>
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<td>Mission Valley Viaduct</td>
<td>8F</td>
<td>8F + 4ML</td>
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</tr>
<tr>
<td>I-805</td>
<td>I-8</td>
<td>I-5</td>
<td>8F</td>
<td>8F + 4ML</td>
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<td>Plaza Blvd.</td>
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HOV Connectors

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Alternative 6: MOBILITY 2030 Transit and Enhanced Highway¹
MOBILITY 2030 Regional Transit Service and Highway with additional I-805 Mixed Flow Lanes and HOV Connectors

**Regional and Corridor Transit Services**

**Heavy Rail**
Route 398: Increase in Coaster service from 36 min. to 20 min. headways in peak period (Tunnel at UTC)

**Light Rail**
Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak
Route 570: New Mid-Coast to Balboa, to UTC, and to Sorrento Mesa with 7.5 min headways in peak period

**New Bus Rapid Transit**
Route 619: 32nd Street to Clairemont Mesa with 5 min. headways in peak period
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**Highway and HOV/Managed Lane Facilities**

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>Improvements</th>
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<td>Mission Valley Viaduct</td>
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<td>West to South, North to East, South to East, and West to North</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 54</td>
<td>South to East &amp; West to North</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 94</td>
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<td>I-805</td>
<td>SR 163</td>
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<td>I-805</td>
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Alternative 7: MOBILITY 2030 Transit and Toll Highway¹
MOBILITY 2030 Regional Transit Service and Toll Lane Highway improvements (transit toll free)

### Regional and Corridor Transit Services

**Heavy Rail**

Route 398: Increase in Coaster service from 36 min. to 20 min. headways in peak period (Tunnel at UTC)

**Light Rail**

Route 510: Increase in Blue Line Trolley service from 15 min. to 7.5 min headways in off-peak

Route 570: New Mid-Coast to Balboa, to UTC, and to Sorrento Mesa with 7.5 min headways in peak period

**New Bus Rapid Transit**

Route 619: 32nd Street to Clairemont Mesa with 5 min. headways in peak period

Route 621: Centre City to Fashion Valley and UTC via Hillcrest/Genesee Avenue with 5 min. headways in peak period

Route 627: H Street to Otay Ranch via Southwestern College with 30 min. headways in peak period

Route 628: Centre City to Otay Mesa via SR 94/I-805 with 5 min. headways in peak period

Route 660: El Cajon to UTC via SR 52 with 10 min. headways in peak period

Route 680: San Ysidro to Sorrento with 5 min. headways in peak period

<table>
<thead>
<tr>
<th>Toll Road Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Freeway</strong></td>
</tr>
<tr>
<td>I-5</td>
</tr>
<tr>
<td>I-805</td>
</tr>
<tr>
<td>I-805</td>
</tr>
<tr>
<td>I-805</td>
</tr>
<tr>
<td>I-805</td>
</tr>
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</table>

**Direct Access Ramps**

<table>
<thead>
<tr>
<th><strong>Freeway</strong></th>
<th><strong>Arterial</strong></th>
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<tbody>
<tr>
<td>I-5</td>
<td>San Ysidro Border Crossing</td>
</tr>
<tr>
<td>I-805</td>
<td>E. Palomar Street</td>
</tr>
<tr>
<td>I-805</td>
<td>Plaza Bonita</td>
</tr>
</tbody>
</table>

**HOV Connectors**

<table>
<thead>
<tr>
<th><strong>Freeway</strong></th>
<th><strong>Intersecting Freeway</strong></th>
<th><strong>Movement</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>I-805</td>
<td>SR 52</td>
<td>West to North &amp; South to East</td>
</tr>
</tbody>
</table>

F = Freeway Lanes

T = Toll Road Lanes

HOV = High Occupancy Vehicle Lanes

¹The I-5 HOV Connector (at the I-805 merge) and the I-5/I-805 Port of Entry (Inspection Facility) are assumed in all alternatives. The 2030 RTP Mobility Network is assumed outside the study area.
Alternative 8: Baseline Transit\(^1\) and Unlimited Highway\(^2\)

Baseline Transit Service and Unlimited Mixed-flow Lane Highway improvements to achieve Level of Service (LOS) E at peak hour.

### Highway Facilities

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>After Improvements</th>
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</thead>
<tbody>
<tr>
<td>I-5</td>
<td>SR 905</td>
<td>SR 54</td>
<td>8F</td>
<td>10F</td>
</tr>
<tr>
<td>I-805</td>
<td>SR 905</td>
<td>SR 54</td>
<td>8F</td>
<td>10F</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>SR 54</td>
<td>Madison</td>
<td>8F</td>
<td>12F</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Madison</td>
<td>I-8</td>
<td>8F</td>
<td>14F</td>
</tr>
<tr>
<td>I-805 NB</td>
<td>SR 54</td>
<td>I-8</td>
<td>8F</td>
<td>12F</td>
</tr>
<tr>
<td>I-805</td>
<td>Mission Valley Viaduct</td>
<td></td>
<td>8F</td>
<td>12F</td>
</tr>
<tr>
<td>I-805</td>
<td>I-8</td>
<td>SR 52</td>
<td>8F</td>
<td>12F</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>SR 52</td>
<td>Nobel Drive</td>
<td>8F</td>
<td>16F</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Nobel Drive</td>
<td>I-5</td>
<td>8F</td>
<td>14F</td>
</tr>
<tr>
<td>I-805 NB</td>
<td>SR 52</td>
<td>I-5</td>
<td>8F</td>
<td>14F</td>
</tr>
</tbody>
</table>

### Auxiliary Lanes

<table>
<thead>
<tr>
<th>Freeway</th>
<th>From</th>
<th>To</th>
<th>Existing</th>
<th>After Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-805 NB</td>
<td>I-8 WB</td>
<td>Murray Ridge Off-Ramp</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>I-805 NB</td>
<td>Murray Ridge Off-Ramp</td>
<td>Murray Ridge On-Ramp</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 NB</td>
<td>Murray Ridge On-Ramp</td>
<td>Kearny Villa Rd.</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Governor Dr.</td>
<td>SR 52 WB</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Mesa College Dr.</td>
<td>Murray Ridge Off-Ramp</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Murray Ridge Off-Ramp</td>
<td>Murray Ridge On-Ramp</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>I-15 SB</td>
<td>Home Ave.</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>43(^{rd}) Ave.</td>
<td>Plaza Blvd.</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>SR 54 EB</td>
<td>Bonita Rd. Off-Ramp</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Bonita Rd. Off-Ramp</td>
<td>Bonita Rd. On-Ramp</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>I-805 SB</td>
<td>Bonita Rd. On-Ramp</td>
<td>H St.</td>
<td>--</td>
<td>2</td>
</tr>
</tbody>
</table>

\(F = \text{Freeway Lanes}\)

\(^1\) The completion of Mission Valley East Trolley and Route 570 (Mid-Coast to Balboa) are assumed under this alternative.

\(^2\) The I-5 HOV Connector (at the I-805 merge) and the I-5/I-805 Port of Entry (Inspection Facility) are assumed in all alternatives. The 2030 RTP Mobility Network is assumed outside the study area.
Alternative 1: No Build

I-805/I-5 Corridor Study
April 2004

Study Area
- Transit
- Managed/HOV Lanes
- General Purpose Lanes
- HOV Connectors
- Direct Access Ramps

Miles 0 1.61 3.22 4.83
Kilometers 0 1.01 2.02 3.22

San Diego Region

12
Alternative 3
I-805/I-5 Corridor Study
April 2004

- Study Area
- Transit
- Managed/HOV Lanes
- General Purpose Lanes
- HOV Connectors
- Direct Access Ramps

MAP AREA
Alternative 5
I-805/I-5
Corridor Study
April 2004

Study Area
- Transit
- Managed/HOV Lanes
- General Purpose Lanes
- HOV Connectors
- Direct Access Ramps

SANDAG

Alternative 5: Enhanced Transit and MOBILITY 2030 Highway
<table>
<thead>
<tr>
<th>Performance Measures</th>
<th>Alternative 2</th>
<th>Alternative 3</th>
<th>Alternative 4</th>
<th>Alternative 5</th>
<th>Alternative 6</th>
<th>Alternative 7</th>
<th>Alternative 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>People Moved</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>++</td>
<td>++</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Travel Time Savings</td>
<td>++</td>
<td>+</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>+</td>
<td>+</td>
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<tr>
<td>Congestion Relief</td>
<td>++</td>
<td>+</td>
<td>+</td>
<td>++</td>
<td>+</td>
<td>+</td>
<td>++</td>
</tr>
<tr>
<td>Work Trips using Alternative Modes</td>
<td>+</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>--</td>
</tr>
<tr>
<td>Ratio of Capital Cost and TTS</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>++</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
</tbody>
</table>

**Study Area Performance Measures**

**Accessiblity**
- Work/school trips within 30 minutes (peak periods)
- Non-work trips within 15 minutes

**Reliability**
- Congested peak period travel conditions
- Congested daily travel conditions

**Livability**
- Homes within 1/2 mile of a transit stop
- Jobs within 1/4 mile of a transit stop

**Equity (minority and low income populations)**
- Work/school trips within 30 minutes
- Non-work trips within 15 minutes

Legend:
- **++** = Strong Improvement or Lowest Capital Cost per TTS
- **+** = Moderate Improvement or Medium Capital Cost per TTS
- **=** = Modest Improvement or Highest Capital Cost per TTS
- **=** = Modest Decline

Alternatives recommended for further study shown in bold.
REGIONAL PLANNING COMMITTEE

May 7, 2004

AGENDA ITEM NO.: 5

Action Requested: ACCEPT

RECOMMENDATIONS ON SMART GROWTH OPPORTUNITY AREAS AND RELATED ITEMS

Introduction

Attached are recommendations from the Regional Planning Technical and Stakeholders Working Groups on the Smart Growth Area Classifications for the San Diego region, guidelines for strengthening the local/regional plan connection, and guidelines for a smart growth incentive program. The SANDAG Board of Directors discussed the smart growth matrix at their April meeting; the attached matrix reflects their comments.

Recommendation

The Regional Planning Committee is asked to accept the attached reports for inclusion in the Urban Form and Implementation chapters of the final Regional Comprehensive Plan (RCP).

Background

The draft RCP states that in addition to meeting regional mobility objectives, SANDAG’s transportation funds also should provide incentives for local agencies to implement land use decisions that support smart growth.

The Urban Form chapter of the draft RCP states that the first step toward focusing SANDAG’s infrastructure investments in support of smart growth is to identify the location of potential “smart growth opportunity areas” (SGOA’s). The draft plan identifies initial categories for opportunity area, and calls for the refinement of the categories between the release of the draft RCP and the adoption of the final plan.

Over the past several months, the Regional Planning Committee and its Technical and Stakeholders Working Groups have been working on three tasks associated with the smart growth discussions in the draft RCP. Specifically, their work has focused on:

1. Refining and expanding the smart growth area classifications to include seven general smart growth categories and developing a matrix that reflects the refined categories (Attachment 1);
2. Preparing guidelines for strengthening the local/regional plan connection (Attachment 2); and
3. Developing a framework for a smart growth incentive program that encourages smart growth development in appropriate locations (Attachment 3).
The smart growth matrix, the guidelines for strengthening the local/regional plan connection, and principles for a smart growth incentive program will be included in the final RCP.

During FY 2005, local jurisdictions and SANDAG will work together to develop a Smart Growth Concept Map, showing the location of two levels of smart growth areas for each of the seven defined categories: areas where smart growth development currently exists or where smart growth is currently included in local plans, and areas with future opportunities for smart growth development.

The SANDAG Board of Directors will be asked to accept the Smart Growth Concept Map as an addendum to the RCP in late FY 2005. The Concept Map will serve as a guide to where SANDAG should focus its incentive funds to promote smart growth and will be used as a critical tool in updating the Regional Transportation Plan (RTP), further strengthening the links between local and regional land use and transportation plans.

Discussion

Classifications of Smart Growth Areas

The Regional Planning Committee and its working groups have been working on developing a matrix of Smart Growth Area Classifications for the San Diego region (Attachment 1). The matrix has been refined to reflect discussion by the SANDAG Board at their April meeting.

The matrix was originally developed by examining several regional efforts in other areas of the nation, including typologies developed by the Denver Regional Council of Governments and the Santa Clara Valley Transit Authority, as well as other contemporary resources, and then compiling data on existing and planned residential and employment intensities for a sampling of areas within the San Diego region.

The matrix includes recommendations for desired ranges of development and employment intensities within each category. In addition, proposed land use and transportation system characteristics for each smart growth area type have been developed. The transportation system characteristics were derived from the existing RTP, matching public transit and other regional transportation facilities and services to appropriate levels of urban development. This ensures that smart growth areas will have the level of public transit service needed, and that transit service is deployed where the land uses can best support it. Urban design features that generally apply across all categories of smart growth areas also are identified.

The matrix will be used as the basis for identifying the smart growth areas to be included in the Smart Growth Concept Map and as the foundation for developing the criteria for the smart growth incentive program, discussed later in this report.

In an effort to build consensus for the SGOA definitions and density ranges, the matrix has been reviewed by the planning staffs of each local jurisdiction. The attached matrix reflects comments and suggestions received at the jurisdictional meetings, comments from the last joint meeting between the working groups on April 22, 2004, and comments by the SANDAG Board at their April 23, 2004 meeting. At their joint meeting, the Technical and Stakeholders Working Groups
unanimously recommended that the Regional Planning Committee accept the matrix for inclusion in the revised Urban Form chapter of the final RCP.

Guidelines for Strengthening the Local/Regional Plan Connection

The Technical and Stakeholders Working Groups also have been developing proposed Guidelines for Strengthening the Local/Regional Plan Connection (Attachment 2). The concept behind the guidelines is to provide a framework for local jurisdictions to consider where their local plans might better connect to the goals and policy objectives of the RCP. With that common understanding of the relationship between the local and regional plans, the guidelines could also be used to assist SANDAG in developing criteria for making funding decisions that would provide incentives for local jurisdictions.

In developing the guidelines, the working groups recognized that, because of the focus in the RCP on encouraging smart growth land uses in key locations (the “smart growth opportunity areas”), local jurisdictions will want to consider how their plans can better connect with the RCP goals and objectives at two levels:

1. What RCP goals and policy objectives are applicable to the entire planning area, and how they might be connected to local general plans and community plans; and
2. What goals and policy objectives are applicable to specific smart growth opportunity areas, and how they might be reflected through general plans, community plans, specific plans, redevelopment plans, development regulations, and other adopted policies.

The guidelines will serve as a tool to strengthen the connection between local land use plans, zoning ordinances, and design standards, and the Regional Comprehensive Plan. They can be used by local jurisdictions as they update their plans and policies, and by SANDAG as it develops criteria for incentive programs and as it prepares its next Regional Transportation Plan. The working groups unanimously recommended support of the attached guidelines to the Regional Planning Committee.

Smart Growth Incentive Program

The Stakeholders and Technical Working Groups also have been working on ideas and recommendations for a smart growth incentive program and made a recommendation of support to the Regional Planning Committee on the attached Framework for Smart Growth Incentive Program (Attachment 3).

A survey of smart growth incentive programs from around the country has been conducted. Existing incentive programs in other regions tend to focus on community-level planning efforts, and smaller-scale capital projects like streetscape enhancements, and pedestrian and bicycle improvements. Several regions provide incentives for building housing by offering grants based on the number of bedrooms built within specified areas. Grant programs range in size from a low of $1 million per year for the Atlanta Regional Council’s Livable Centers Initiative to $500 million over 25 years for a variety of funding programs being implemented by the Sacramento Area Council of Governments.

The final RCP will include principles for an incentive program for the San Diego region, as outlined in Attachment 3, building upon the concepts and categories contained in the smart growth matrix.
Final program development will occur next fiscal year, with the first funding cycle likely to occur when SANDAG has the opportunity to program Transportation Enhancement Activity (TEA) funds available through the 2004 State Transportation Improvement Program (STIP).

Summary and Next Steps

The concepts included in the matrix of Proposed Smart Growth Area Classifications, the Guidelines for Strengthening the Local/Regional Plan Connection, and the Framework for Smart Growth Incentive Program will be included in the revised Urban Form and Implementation chapters of the final RCP.

The revised draft RCP will be presented to the Regional Planning Committee and its working groups for review at their May 24, 2004 joint meeting. The SANDAG Board of Directors will be asked to verify the final EIR and adopt the revised final Regional Comprehensive Plan on June 25, 2004.

BOB LEITER
Director of Land Use and Transportation Planning

Attachments

Key Staff Contact: Stephan Vance, (619) 699-1924; sva@sandag.org
### PROPOSED SMART GROWTH AREA CLASSIFICATIONS

#### Smart Growth Design Principles

- **Human-scale built environment that creates uniqueness and identity**
- **Vertically and horizontally mixed use development, with vertical mixed use located near transit stations**
- **Robust transportation choices that compliment the intensity of development within the Smart Growth Opportunity Area (SGOA)**
  - Strong pedestrian orientation: network of streets & pedestrian paths, narrower street scales, special designs to facilitate pedestrian crossings at intersections, and the walker having precedence
  - Bike access/locker facilities and park-n-ride facilities woven in the human-scale design
  - Transit station(s) located centrally within main activity area(s); transit user amenities located adjacent to stations (e.g. child care facilities, coffee bars, dry cleaning drop-off)
- **Nearby recreational facilities and public plazas**

#### Table

<table>
<thead>
<tr>
<th>Category</th>
<th>Land Use Type Characteristics</th>
<th>Land Use Intensity Targets</th>
<th>Transportation System Characteristics</th>
<th>Public Transit Service Characteristics</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Metropolitan Center</strong></td>
<td>• Draws from throughout the region</td>
<td>• Desired Building Types: Mid-to high-rise residential and office/commercial</td>
<td>• Access from several freeways with multiple access points</td>
<td>• Served by numerous corridor/regional/local services</td>
<td>• Downtown San Diego</td>
</tr>
<tr>
<td></td>
<td>• Metropolitan center has several SGOA designations</td>
<td>• 75+ du/ average net residential acre within ¼ mile radius of transit station</td>
<td>• Hub transit system</td>
<td>• Very high frequency service (&lt;15 minute) throughout the day on all corridor/regional services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Regional commercial/retail center</td>
<td>• 80+ employees/average net acre within ¼ mile of transit station</td>
<td>• Regional hub for numerous local, corridor, regional transit lines</td>
<td>• High frequency service (15 minute) all day on most local services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Regional civic/cultural center</td>
<td>• Desired Building Types: Mid-to high-rise residential and office/commercial</td>
<td>• Shuttle services and pedestrian orientation for internal trips</td>
<td>• Multiple station locations, with several key transfer points</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Freeway connections with multiple access points</td>
<td>• Internal shuttle system</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Served by several corridor/regional lines &amp; several local services</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• High to very high frequency service (&lt;15 minute peak) on all corridor/regional services</td>
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<tr>
<td></td>
<td></td>
<td>• High frequency throughout the day on all lines</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>• Key transit center, along with multiple smaller station locations</td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td>• Possible internal shuttle system</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Urban Center</strong></td>
<td>• Employment draws from throughout region, while other uses draw mainly from subregional area</td>
<td>• Desired Building Types: Mid-to high-rise residential and office/commercial</td>
<td>• Served by several corridor/regional lines &amp; several local services</td>
<td></td>
<td>Existing and Planned:</td>
</tr>
<tr>
<td></td>
<td>• Urban centers likely located within larger area that has several SGOA designations</td>
<td>• 40-75+ du/average net acre residential within ¼ mile radius of transit station</td>
<td>• Served by several corridor/regional transit lines + several local services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mixed use employment</td>
<td>• 25+ du/ac for mixed use sites within ¼ mile radius of transit station</td>
<td>• Possible shuttle routes for internal trips</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Civic/cultural facilities</td>
<td>• 50+ employees per net acre within ¼ mile of transit station</td>
<td>• Minimal park-and-ride facilities—access should be handled by internal shuttle system</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Possible internal shuttle system</td>
<td></td>
<td></td>
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## Proposed Smart Growth Area Classifications (Pg 2 of 4)

<table>
<thead>
<tr>
<th>Category</th>
<th>Land Use Type Characteristics</th>
<th>Land UseIntensity Targets</th>
<th>Transportation System Characteristics</th>
<th>Public Transit Service Characteristics</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Town Center  | • Draws mainly from immediate subregional area  
  • Residential and office/commercial, including mixed use  
  • Civic/cultural facilities | • Desired Building Types: Low- to mid-rise  
  • 20-45+ du/average net acre within ¼ mile radius of transit station or connecting transit service  
  • 30-50 employees/average net acre within ¼ mile of transit station or connecting transit service | • Served by one or more corridor/regional transit line and several local services  
  • May also be served by regional arterials | • Served by 1-2 corridor/regional line or <5 minute shuttle distance from corridor/regional station, + multiple local services  
  • Very high frequency service (<15 minute peak) on corridor/regional service or connecting shuttle  
  • High frequency throughout the day on most lines  
  • Multiple station locations, some with central access/transfer point  
  • Shared-use parking or dedicated park-and-ride facilities for regional transit services | Existing and Planned:  
  • Downtown Oceanside  
  • Downtown Escondido  
  • Downtown Encinitas  
  • Downtown La Mesa  
  • Downtown El Cajon  
  • Downtown Chula Vista  
  • La Jolla (San Diego)  
  • Village Center Pilot Village (Euclid/Market) (San Diego)  
  • Hillcrest (San Diego)  
  • Heart of the City (San Marcos)  
  • Vista Village Transit Center  
  • Grantville Trolley Station (SD)  
  • San Marcos Creek Specific Plan |
| Community Center | • Draws from nearby community/neighborhoods  
  • Residential and commercial, including mixed use  
  • Possible community-serving civic uses | • Desired Building Types: Low- to mid-rise  
  • 20-45+ du/average net acre within ¼ mile of transit station | • Served by at least one corridor or regional transit line  
  • Served by arterials and/or collector streets | • Served by at least one corridor/ regional service  
  • High frequency service (15 minute peak) on corridor/regional services  
  • Moderate to high frequency throughout the day  
  • One or more on-street stations | Existing and Planned:  
  • Otay Ranch Villages  
  • Mercado (Barrio Logan) (San Diego)  
  • Mira Mesa Market Center (San Diego)  
  • Pacific Highlands Ranch (SD)  
  • Downtown Lemon Grove  
  • Downtown Coronado  
  • San Elijo/La Costa Meadows Community Center (San Marcos)  
  • Solana Beach/NCTD Mixed Use Site  
  • Lakeside (County)  
  • Spring Valley (County)  
  • San Elijo/La Costa Meadows Community Center (San Marcos)  
  • Vista Village Transit Center  
  • Grantville Trolley Station (SD)  
  • San Marcos Creek Specific Plan |
### PROPOSED SMART GROWTH AREA CLASSIFICATIONS (Pg 3 of 4)

<table>
<thead>
<tr>
<th>Category</th>
<th>Land Use Type Characteristics</th>
<th>Land Use Intensity Targets</th>
<th>Transportation System Characteristics</th>
<th>Public Transit Service Characteristics</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Transit Corridor | - Draws mainly from several nearby communities  
- Residential and office/commercial, including mixed-use  
- Linear size with length extending from >1 mile long, and width extending 1-2 blocks outward from corridor | - Desired Building Types: A variety of low-, mid-, and high-rise  
- 25-75+ du/average net acre along transit corridor and within ¼ mile of transit stations  
- Employment: Commercial and retail supportive uses | - Located along a major arterial  
- Served by a corridor/regional service, or local services with <10 minute travel time of corridor/regional line station  
- Small shared-use park-and-ride facilities possible | - Generally served by a corridor/regional line + local services  
- High frequency service (15 minute in peak) on corridor/regional and/or local services  
- Multiple station locations, with one or more on-street transfer locations with intersecting services. | Existing and Planned:  
- El Cajon Blvd (Mid-City)  
- Washington Ave (Mission Hills)  
- University Avenue (La Mesa)  
- South Santa Fe Transit Corridor (Vista)  
Potential SGOA:  
- El Caminito Real (Encinitas) |
| Special Use Center | - Employment draws from throughout region, with other uses being community serving  
- Special use centers may be located within larger area that has several SGOA designations  
- Dominated by one non-residential land use  
- Retail support services  
- Potential residential element | - Desired Building Types: A variety of low-, mid-, and high-rise  
- 45+ employees/average net acre within ¼ mile of transit station  
- Optional residential: 50+ du/average net residential acre | - Nearby freeway access  
- Served by one or more corridor/regional lines and local services  
- May be served by shuttle service for internal trips | - Generally served by one or more corridor/regional line + local services  
- High to very high frequency service (15 minute or better in peak) on corridor/regional services  
- Moderate to high frequency throughout the day  
- Multiple station locations, with possible central access/transfer point | Existing and Planned:  
- Grossmont Center/ Hospital/Trolley Station (La Mesa)  
- The Paseo at SDSU (San Diego)  
- Chula Vista Bayfront  
- Palomar College (San Marcos)  
- Cal State San Marcos  
Potential SGOAs:  
- Ocean Ranch / Rancho Del Oro Industrial Complex (Oceanside)  
- Vista County Courthouse Area |
### PROPOSED SMART GROWTH AREA CLASSIFICATIONS (Pg 4 of 4)

<table>
<thead>
<tr>
<th>Category</th>
<th>Land Use Type Characteristics</th>
<th>Land Use Intensity Targets</th>
<th>Transportation System Characteristics</th>
<th>Public Transit Service Characteristics</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Rural Village Core +     | • Village Core is concentrated area of residential and commercial development within overall village*  
                           | • Draws from nearby rural areas                                                                    | • Concentrated local road network within village, with connection to urban areas                  | • Village Cores should include or allow for bus stops and an expansion of bus service in higher density areas  
                           | • Low-rise employment and residential                                                                  | • Desired Building Types: Low-rise residential  
                           | • Civic center                                                                                         | • Bicycle and pedestrian-friendly street design in Village Core                                                                                          | • Served by one or more local services  
                           |                                                                                                           | • 20+ employees/net average acre                                                                         | • Possible park-n-ride facilities near major road or transit corridor  
                           |                                                                                                           |                                                                                                           | • Possible local transit service; or central access point for possible corridor/regional service with transit stations located within village core  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | Existing and Planned:  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | • Ramona  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | • Fallbrook  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | • Alpine  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | • Julian  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | Potential SGOA:  
                           |                                                                                                           |                                                                                                           |                                                                                                           |                                                                                                           | • Valley Center |

* Rural Village Core within Unincorporated Rural Villages

The County of San Diego’s draft GP2020 defines rural villages as distinct communities that include concentrated areas of residential and commercial development contained by a Village Limit Line. Villages typically range from 1,000 to 7,000 acres (but could be as small as 150 acres) and are located within or partly within the San Diego County Water Authority water service boundary. Villages contain densities that range from 2 – 29 du/acre, with the lowest density typically located near the Village Limit Line. Each village contains a Village Core with residential densities ranging from 10.9 – 29 du/acre. Lowest densities within villages are typically located near Village Limit Lines, with preliminary floor area ratios (FARs) of .25 within the Village Limit Line (likely higher within the Village Core). The villages form up to 20% of the overall community, with the remainder encompassing semi-rural and rural lands.

Potential SGOAs: Areas discussed at local and regional meetings with local planning directors that are not currently included in existing plans and policies, but may offer the potential for additional smart growth.

**Transportation System Characteristics**
- Concentrated local road network within village, with connection to urban areas.
- Bicycle and pedestrian-friendly street design in Village Core.
- Possible park-n-ride facilities near major road or transit corridor.
- Possible local transit service; or central access point for possible corridor/regional service with transit stations located within village core.

**Public Transit Service Characteristics**
- Village Cores should include or allow for bus stops and an expansion of bus service in higher density areas.
- Served by one or more local services.
- Moderate frequencies throughout the day.
- Possible peak period corridor/regional service with transit stations located within village core.

**Examples**
- Existing and Planned: Ramona, Fallbrook, Alpine, Julian.
- Potential SGOA: Valley Center.

**Land Use Intensity Measurements per Net Acre:**
- Residential = Total dwelling units divided by built or planned residential acreage net of public right-of-way.
- Employment = Total employees divided by built or planned office, commercial, and retail acreage net of public right-of-way.
- Mixed Use = Total dwelling units divided by built or planned residential acreage net of public right-of-way and any other non-residential uses (e.g., commercial, retail, etc.).

**Land Use Building Type Definitions:**
- Low Rise = 2-3 stories.
- Mid-Rise = 4-6 stories.
- High Rise = 7+ stories.

**Transit Service Definitions:**
- Shuttle services (Green Car) – Designed for short-distance trips in neighborhood/employment areas, and feeder access to/from corridor & regional services.
- Local services (Blue Car) – Designed for shorter-distance trips with frequent stops (e.g., current local bus services).
- Corridor services (Red Car) – Designed for medium distance trips with stations spaced about every mile on average (e.g., trolley services, future arterial based BRT routes).
- Regional services (Yellow Car) – Designed for longer distance trips with stations spaced every 4-5 miles on average (e.g., Coaster, future freeway-based BRT routes).

* Village Core is a concentrated area of residential and commercial development within overall village. It typically ranges from 1,000 to 7,000 acres and contains densities ranging from 2 – 29 du/acre. The Village Core is likely to have lower densities near Village Limit Lines, with preliminary floor area ratios (FARs) of .25 within the Village Limit Line (likely higher within the Village Core). The villages form up to 20% of the overall community, with the remainder encompassing semi-rural and rural lands.

**Notes:**
- 10-30+ du/average net acre (residential or mixed use).
- Desired Building Types: Low-rise residential.
- 20+ employees/net average acre.
- Served by one or more local services.
- Moderate frequencies throughout the day.
- Possible peak period corridor/regional service with transit stations located within village core.

**Related Definitions:**
- Public Transit Service Characteristics
- Village Cores should include or allow for bus stops and an expansion of bus service in higher density areas.
- Served by one or more local services.
- Moderate frequencies throughout the day.
- Possible peak period corridor/regional service with transit stations located within village core.

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**Examples:**
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**Examples:**
- Existing and Planned: Ramona, Fallbrook, Alpine, Julian.
- Potential SGOA: Valley Center.
PROPOSED GUIDELINES FOR STRENGTHENING THE LOCAL / REGIONAL PLAN CONNECTION
May 7, 2004

The following proposed guidelines serve as a tool to strengthen the connection between local land use plans and the Regional Comprehensive Plan. Because of the focus in the RCP on encouraging smart growth land uses in key locations (the “smart growth opportunity areas” (SGOAs)), the guidelines help make connections between local and regional plans at two levels: the entire planning area (general and community plans), and more specifically, the SGOAs. The guidelines can be used by local jurisdictions as they update their plans and policies, and by SANDAG as it prepares the next RTP and develops criteria for incentive programs.

<table>
<thead>
<tr>
<th>(1) GENERAL PLAN / COMMUNITY PLAN</th>
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<th>(3) RCP GOALS AND POLICY OBJECTIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRANSPORTATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Incorporate 2030 Mobility Network plans into Circulation Element.</td>
<td>a. Incorporate all Circulation Element transportation facilities into specific plan for the SGOA.</td>
<td>a. Develop a flexible, sustainable, and well integrated transportation system that focuses on moving people and goods.</td>
</tr>
<tr>
<td>b. Include policies and strategies regarding transportation demand management (TDM) and transportation systems management (TSM).</td>
<td>b. Include specific programs such as TDM and TSM strategies for SGOA.</td>
<td>b. Implement the Regional Transportation Plan 2030 Mobility Network.</td>
</tr>
<tr>
<td>c. Include policies and strategies promoting use of transit priority measures.</td>
<td>c. Where appropriate, include plans for transit priority measures in SGOA.</td>
<td>c. Provide a wide range of convenient, efficient, and safe transportation choices.</td>
</tr>
<tr>
<td>d. Include policies and strategies promoting pedestrian and bicycle use.</td>
<td>d. Include design guidelines and strategies to promote pedestrian and bicycle use in SGOA.</td>
<td>d. Reduce congestion on freeways and arterials.</td>
</tr>
<tr>
<td>e. Include policies and strategies that give priority to transportation system improvements in SGOA’s.</td>
<td>e. Include strategies to finance and construct necessary transportation system improvements concurrent with development in SGOA.</td>
<td>e. Develop a network of fast, convenient, high-quality transit services.</td>
</tr>
<tr>
<td>f. Include policies and strategies addressing goods movement.</td>
<td>f. Improve service levels and quality of transit service.</td>
<td>f. Improve service levels and quality of transit service.</td>
</tr>
<tr>
<td>g. Include policies and strategies to improve intermodal connectivity.</td>
<td>g. Create more walkable and bicycle-friendly communities.</td>
<td>g. Create more walkable and bicycle-friendly communities.</td>
</tr>
<tr>
<td>h. Give priority to regional roadway and transit investments in smart growth opportunity areas (SGOA’s).</td>
<td>h. Give priority to regional roadway and transit investments in smart growth opportunity areas (SGOA’s).</td>
<td>h. Give priority to regional roadway and transit investments in smart growth opportunity areas (SGOA’s).</td>
</tr>
<tr>
<td>i. Provide improved access to goods movement centers and intermodal facilities.</td>
<td>i. Provide improved access to goods movement centers and intermodal facilities.</td>
<td>i. Provide improved access to goods movement centers and intermodal facilities.</td>
</tr>
<tr>
<td>j. Improve connectivity of different transportation modes.</td>
<td>j. Improve connectivity of different transportation modes.</td>
<td>j. Improve connectivity of different transportation modes.</td>
</tr>
</tbody>
</table>
URBAN FORM

a. Designate appropriate urban land uses in areas most accessible to existing and planned regional transportation facilities and other public facilities (i.e., SGOA’s), using “Smart Growth Categories” as guidelines included in the final RCP.

b. Include policies and strategies to protect natural biological communities and wetlands from adverse effects of urban land uses, and to preserve natural features, such as canyons, and small parks in our urban areas.

c. Include policies and strategies that promote development of walkable communities, while recognizing the importance of preserving existing community character.

d. Include policies and strategies that place a high priority on providing adequate public facilities and services to SGOA’s.

e. Include policies and strategies to encourage redevelopment and infill development in SGOA’s.

f. Include policies and strategies to address land use compatibility.

a. Include policies and strategies to ensure that the appropriate mix and intensity of land use is achieved in the SGOA.

b. Include policies and guidelines to ensure that urban design within the SGOA meets regional and local goals within the context of local community character.

c. Include policies to ensure that adequate public facilities can be provided in or near the SGOA.

d. Include policies that provide incentives for development or redevelopment in the SGOA.

e. Focus future population and job growth away from rural areas and closer to existing and planned job centers and public facilities.

b. Protect agricultural areas and high-value habitat areas.

c. Protect natural systems and other open space areas that define the character of our communities.

d. Create safe, walkable, and vibrant communities that are designed and built to be accessible to people of all abilities.

e. Preserve the positive aspects and unique sense of place of existing communities, while allowing flexibility for change.

f. Place high priority on public facility investments that support compact, mixed use, accessible walkable neighborhoods that are conveniently located to transit.

g. Improve existing public facilities in smart growth areas to mitigate the impact of higher intensities of use.

h. Facilitate redevelopment and infill development.

i. Protect public health and safety by avoiding and/or mitigating incompatible land uses.
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<tbody>
<tr>
<td><strong>HOUSING</strong></td>
<td></td>
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</tr>
<tr>
<td>a. Include an updated Housing Element that provides sites with appropriate densities that would meet with the most recently adopted Regional Share Allocation in the Regional Housing Needs Assessment</td>
<td>a. Provide incentives for additional housing capacity in SGOAs.</td>
<td>a. Provide a variety of affordable and quality housing choices for people of all income levels and abilities.</td>
</tr>
<tr>
<td>b. Contain policies and strategies to provide housing for people of all income levels and abilities.</td>
<td></td>
<td>b. Increase the supply and variety of housing choices, especially multi-family housing, for residents of all ages and income levels.</td>
</tr>
<tr>
<td>c. Include policies and strategies to minimize displacement of residents when redevelopment and revitalization occurs.</td>
<td></td>
<td>c. Provide an adequate supply of housing for our region’s workforce to minimize interregional commuting.</td>
</tr>
<tr>
<td>d. Include an updated Land Use Element that provides adequately planned and zoned land to meet housing needs identified in the Housing Element.</td>
<td></td>
<td>d. Increase homeownership.</td>
</tr>
<tr>
<td>e. Include policies and strategies to ensure that an appropriate number and mix of housing units affordable to all income categories is included in plans for SGOA’s.</td>
<td></td>
<td>e. Minimize the displacement of lower income and minority residents as housing costs rise when redevelopment and revitalization occurs.</td>
</tr>
<tr>
<td>f. Include policies and strategies that promote maintenance of safe, healthy, environmentally sound, and accessible housing.</td>
<td></td>
<td>f. Integrate housing with jobs, transit, schools, recreation, and services, creating more livable neighborhoods and mixed use communities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>g. Maintain, preserve, and rehabilitate the existing housing stock.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>h. Provide safe, healthy, environmentally sound, and accessible housing for all segments of the population.</td>
</tr>
</tbody>
</table>
HEALTHY ENVIRONMENT

a. Designate sensitive lands for appropriate non-urban land uses.
b. Include policies and strategies to minimize impacts on sensitive lands of adjoining urban uses.
c. Include policies and strategies to minimize impact of new development and redevelopment on water quality.
d. Include policies and strategies to eliminate or reduce existing sources of water pollution.
e. Designate beaches and near shore areas for appropriate land uses.
f. Include policies and strategies to preserve and enhance beaches and near shore areas.
g. Include policies and strategies to minimize air pollution from stationary sources.
h. Include policies and strategies to encourage energy-efficient design in new development and redevelopment.

a. Where applicable, provide for preservation of on-site natural biological communities and wetlands in accordance with adopted plans.
b. Where applicable, provide for mitigation of water quality impacts.
c. Where applicable, ensure appropriate uses for designated beach and near shore areas.
d. Include strategies to implement regional and local air quality policies.

d. Include policies and strategies to minimize air pollution from stationary sources.

e. Preserve and maintain natural biological communities and species native to the region.
b. Protect our region’s wetlands.
c. Restore, protect, and enhance the water quality and the beneficial uses of local coastal waters, inland surface waters, and ground water.
d. Reduce or eliminate pollutants in our region’s water bodies.
e. Preserve and enhance the region’s beaches and near shore areas as environmental and recreational resources.
f. Achieve and maintain federal and state clean air standards.
### ECONOMIC PROSPERITY

<table>
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<tbody>
<tr>
<td><strong>a.</strong> Designate adequate land with appropriate zoning and services to meet future employment needs.</td>
<td><strong>a.</strong> Ensure that the mix of residential and non-residential land uses within the SGOA is consistent with general plan goals and policies regarding jobs – housing balance.</td>
<td><strong>a.</strong> Ensure a rising standard of living for all of our residents.</td>
</tr>
<tr>
<td><strong>b.</strong> Include policies and strategies that address jobs/housing balance within a subregional or local context.</td>
<td></td>
<td><strong>b.</strong> Position the San Diego regional to better compete in the global economy.</td>
</tr>
<tr>
<td><strong>c.</strong> Include policies that facilitate coordination with educational institutions in siting appropriate educational facilities.</td>
<td></td>
<td><strong>c.</strong> Produce more high-quality jobs in the region.</td>
</tr>
<tr>
<td><strong>d.</strong> Include policies and strategies that promote efficient regulatory processes and fee structures.</td>
<td><strong>b.</strong> Provide incentives for development in SGOA’s.</td>
<td><strong>d.</strong> Foster growth in the region’s emerging high technology industries.</td>
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<tr>
<td></td>
<td></td>
<td><strong>e.</strong> Provide an adequate supply of housing for our region’s workforce.</td>
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<td></td>
<td></td>
<td><strong>f.</strong> Offer broad access to education and workforce development opportunities for all residents.</td>
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<td><strong>g.</strong> Improve the business environment.</td>
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<tr>
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PUBLIC FACILITIES

- **a.** Include policies and strategies to reduce water use and to utilize recycled water to the maximum extent possible.
- **b.** Include policies and strategies to reduce energy consumption.
- **c.** Include policies and strategies to increase waste stream diversion in accordance with regional goals.

<table>
<thead>
<tr>
<th>a.</th>
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<td>b.</td>
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<tr>
<td>c.</td>
<td>c.</td>
<td>d.</td>
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</table>

- **Provide bicycle and pedestrian paths in smart growth opportunity areas.**
- **Ensure a safe, sufficient, reliable, and cost-efficient water supply for the region.**
- **Meet the region’s energy needs in a fiscally and environmentally sound manner.**
- **Minimize the need for additional landfills and provide economically and environmentally sound resource recovery, management, and disposal facilities.**
- **Exceed the state-mandated 50 percent waste stream diversion rate by the year 2005 and work toward a 75 percent diversion rate.**
### PUBLIC FACILITY FINANCING

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<tr>
<td>a. Include general plan policies that includes performance standards, an assessment existing and projected deficiencies, and policies and strategies to mitigate deficiencies over time.</td>
<td>a. Regularly assess the ability of our infrastructure to handle change and maintain our quality of life.</td>
<td></td>
</tr>
<tr>
<td>b. Include policies and strategies to ensure that capital improvement programs support priorities established in the general plan and community plans.</td>
<td>b. Align our infrastructure plans with our RCP goals and objectives.</td>
<td></td>
</tr>
<tr>
<td>c. Include policies and strategies that encourage capital improvement projects serving SGOA’s</td>
<td>c. Create a planning framework that coordinates and links long term visionary goals with shorter term capital expenditures across service providers.</td>
<td></td>
</tr>
<tr>
<td>d. Include policies and strategies that encourage the provision of adequate facilities concurrent with need resulting from new development and redevelopment.</td>
<td>d. Directly link transportation and other infrastructure capital improvement programming to land use decisions that support the urban form and design goals in the RCP.</td>
<td></td>
</tr>
<tr>
<td>e. Include policies and strategies to ensure that new development pays its fair share for regional transportation facilities and other appropriate infrastructure needs through development impact fees or other measures set forth in regional plans and implementing programs.</td>
<td>e. Provide adequate infrastructure improvements prior to or concurrent with the population growth occurring in smart growth opportunity areas.</td>
<td></td>
</tr>
<tr>
<td>f.</td>
<td>f. Develop incentive based methods for prioritizing transportation and other infrastructure improvements to encourage changes that support the smart growth goals and objectives of the RCP.</td>
<td></td>
</tr>
<tr>
<td>g.</td>
<td>g. Ensure adequate funding to cover the capital, operational, and maintenance costs of the regional transportation system (Transportation Chapter).</td>
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</table>
PROVIDING INCENTIVES FOR SMART GROWTH

Successful implementation of the Regional Comprehensive Plan will require incentives for “smart growth” development that meets the goals and policies of the RCP. There are a number of different approaches to providing such incentives.

Regional Transportation Network Funding Based on Smart Growth

Because urban form is so critical to the success of the future regional transportation system, and conversely, because transportation is so critical to the success of urban form, SANDAG’s funding decisions regarding priorities for the expansion and improvement of the regional transportation system should be linked to existing and planned land uses that are recognized as being supportive of regional transportation goals.

For example, decisions regarding priorities for future regional transit, arterial, and highway corridor projects should be based in part on how well local communities have planned for “smart growth” land uses that facilitate a robust set of transportation choices that increase mobility. These decisions, including, for example, investments in enhanced transit services and stations, and highway improvements serving rural villages, should be based in part on how well smart growth opportunity areas incorporate the smart growth principles contained in the RCP. These types of priorities should be reflected in the criteria that are used for prioritizing transportation projects (see discussion in RCP Chapter 4B, “Setting Priorities for Transportation Improvements.”)

Direct Financial Incentives for Smart Growth Development

There is growing recognition that smart growth development, particularly in redeveloping areas, can require significant up-front investments in infrastructure other than regional transportation facilities. To meet these needs, the Regional Transportation Plan recommended that a “Smart Growth Incentive Program (SGIP)” be established, starting with a 5-year, $25 million pilot incentive program.

A wide variety of project types could be funded through the SGIP. The potential project types identified below are based on research on similar programs developed in other regions, including the existing Transportation for Livable Communities program in the Bay Area, the proposed projects in the Sacramento area Metropolitan Transportation Plan, and in Portland, Oregon.

Types of Projects on Which Smart Growth Incentive Funds Could be Used

Community Design Planning. The key to implementing successful SGOA’s is the application of good urban design principles that reflect the values and character of the individual communities. Successful community planning and development can ensure that public areas are attractive and inviting places that are well-integrated with the surrounding communities. The SGIP can provide funding support to jurisdictions that have identified a need to amend their codes or develop specific plans to reflect smart growth urban design principles.
Community-based planning studies help develop community support for smart growth urban design principles, and for specific area plans in SGOA’s. The studies also could identify the improvements necessary for a community to ensure that: SGOA’s provide a healthy set of transportation choices that increase mobility; transit stations and surrounding areas are attractive and transit-friendly; and SGOA’s are walkable places. These improvements could then be the basis for future SGIP grant applications for capital projects. It is recommended that SANDAG staff participate directly in these planning studies to provide technical assistance, and to ensure that project goals are met. Local planning grants typically would include extensive community outreach and visioning, concept plans and drawings, construction cost estimates, and implementation plans.

Transportation Enhancements within Smart Growth Opportunity Areas. The SGIP could support capital projects that enhance the connections between the transportation/transit network and smart growth areas. Typical projects would include small-scale transportation improvements that enhance local communities and town centers through improved bicycle and pedestrian circulation, traffic calming, and transit station area enhancements such as shelters and benches. Transit stations on regional transit routes would be developed by SANDAG as part of the regional transit project, but would be coordinated with local improvement plans.

Streetscape and Public Plazas Enhancements. Civic plazas and other public places that improve the walkability and the human scale of the SGOA could be funded under the program. Projects could include providing street trees and other landscaping, public art, and the provision of public seating. Projects outside what is conventionally considered the public right of way would be beyond the scope of what is supported by most traditional transportation funding sources, and would require innovative funding strategies.

Public Parking. With enhanced transportation choices, including walkability and increased public transit services, the demand for parking can be reduced, but parking will remain a significant cost of development. The walkability of smart growth areas can be improved when parking is centralized in community parking structures, particularly as part of a mixed use project. Commercial development and affordable housing opportunities can also be encouraged if on-site parking requirements can be reduced. Providing structured public parking can require a significant investment, and may not be an eligible cost under some transportation funding programs, but SANDAG should investigate strategies to fund community parking projects.

Housing Incentives. Increased housing density near major transit hubs produces numerous regional benefits in the form of more housing choices, increased mobility, increased transit ridership, reduced auto dependency, and less land consumption. Providing affordable housing also helps meet regional goals for increasing housing for lower-income communities. A housing incentive program may be appropriate to consider in the SGIP in the San Diego region if a feasible array of programs could be established.

Transit Oriented Development (TOD) Investment Programs. A funding program to stimulate private investment in high-density, pedestrian-friendly commercial and residential projects near transit stations could be established. Through a series of cooperative agreements, this program could be used to fund site acquisition. Station area properties could be acquired, planned, re-parceled, and sold with conditions to private developers for constructing transit-oriented development. In many cases the land value could be reduced via public agency acquisition and conveyance to a developer to cover the extraordinary development costs required to construct a TOD project, especially where
affordable housing is included. In such cases, a "highest and best transit use" appraisal could be used to establish the sale price of the property.

POTENTIAL FUNDING SOURCES FOR A REGIONAL SMART GROWTH INCENTIVE PROGRAM

Because the RCP calls for SANDAG to coordinate its transportation investments with local land use decisions, all transportation funds that SANDAG programs can, to some extent, provide incentives for smart growth development. How this strategy is implemented will be determined as SANDAG updates its transportation project prioritization process in the first phase of RCP implementation and subsequent Regional Transportation Plan updates. For the Smart Growth Incentive Program, available funding sources include federal transportation funds and, potentially, TransNet local transportation sales tax revenue. State transportation funding programs that are not administered by SANDAG could be used by local jurisdictions to provide smart growth incentives, and a variety of non-transportation state and federal funding programs also are available to local jurisdictions.

Federal Transportation Programs. Most funding programs administered by the Federal Highway Administration could be used for projects that support smart growth. Surface Transportation Program (STP) funds may be used to support highway, public transit, or bicycle and pedestrian projects. The Transportation Enhancement Activities (TEA) program is a subcategory of the STP program established to fund non-traditional transportation related projects. Among the types of projects eligible under this program are bicycle and pedestrian facilities, preservation of historic structures related to the transportation network, and landscaping and highway beautification. SANDAG has previously used the TEA program to support TOD projects. The Congestion Mitigation and Air Quality (CMAQ) program sets aside funding specifically for projects that reduce air pollution or congestion, and cannot be used to construct roadways for use by single occupant vehicles. SANDAG could dedicate a portion of these funds to the Smart Growth Incentive Program.

TransNet. Ultimately, SANDAG anticipates funding the SGIP from the Smart Growth Incentive Program that is a component of the draft ordinance for the extension of the TransNet local transportation sales tax. Assuming the TransNet Extension is approved by the voters in November 2004, this program would take effect in 2009. The ordinance sets aside two percent of the TransNet revenues for the Smart Growth Incentive Program, which would generate approximately $280 million (in 2002 dollars) over the 40-years the sales tax extension would be collected. The draft ordinance specifies that the program would provide funding for “a broad array of transportation-related infrastructure improvements that will assist local agencies in better integrating transportation and land use, such as enhancements to streets and public places, funding of infrastructure needed to support development in smart growth opportunity areas consistent with the Regional Comprehensive Plan, and community planning efforts related to smart growth and improved land use/transportation coordination.” It also specifies that funds will be allocated on a regional competitive grant basis, and that the funds should be used to match federal, state, local, and private funding to maximize the number of improvements to be implemented.

The Local Streets and Roads program in the TransNet Extension also permits local jurisdictions to use their formula funds for projects that would support smart growth development. Among the eligible uses for these funds are community infrastructure improvements to support smart growth development, capital improvements needed to facilitate transit services and facilities, and operating support for local shuttle and circulator routes and other services.
Because the TransNet Extension would be a local source of funds administered by SANDAG, it would allow considerable flexibility with regard to how the funding could be used. However, because the new TransNet ordinance would not go into effect until 2009, other funding sources need to be identified if the Smart Growth Incentive Program is to begin in the near term.

Transportation Development Act (TDA) Funds. The TDA is a state sales tax supported program administered locally by SANDAG. Each year, SANDAG allocates two percent of the TDA funds for bicycle and pedestrian projects. The projects are selected based on an array of criteria that include the amount of population and employment that the project would serve. Once the Smart Growth Concept Map is developed, the criteria could be modified to encourage projects in Smart Growth Opportunity Areas.

State Transportation Grant Programs. The State of California offers grants under several programs that, if awarded to local jurisdictions, could be applied to smart growth areas. These programs include Safe Routes to School, the Bicycle Transportation Account, Community Based Transportation Planning Demonstration Grant Program, and the Environmental Enhancement and Mitigation Program.

Non-transportation Funding Sources. A wide array of non-transportation funding sources could be used to support smart growth. These typically are competitive grant programs that are administered by state or federal agencies. The State Department of Housing and Community Development (HCD) offers several programs to assist with the provision of housing. The Department of Parks and Recreation offers grant programs for habitat conservation and recreational facilities. At the federal level, the Department of Housing and Urban Development, U.S. Fish and Wildlife Service, the U.S. Environmental Protection Agency, and the Economic Development Administration administer grant programs to support community development, housing, habitat protection, and economic development.

LOCAL INCENTIVES FOR SMART GROWTH

In addition to developing a regional smart growth incentive program based on the approach outlined above, local jurisdictions should consider providing local incentives to promote smart growth. For example, the City of San Diego has included local incentives in its “Pilot Village Program.” Similarly, the City of Encinitas provides incentives for mixed use development and parking reductions in appropriate locations. As another example, the City of Oceanside allows mixed use development as a conditional use in its commercial zones. This allows the flexibility to establish mixed use in areas that otherwise would be restricted to commercial use.

Local incentives could include: capital improvement program (CIP) priority treatment, fee reductions for zoning, subdivision, site plan applications, and water and wastewater capital recovery fees, particularly within the Smart Growth Opportunity Areas and local redevelopment areas. Local jurisdictions could also expedite project approvals in smart growth areas, and could apply other incentives such as reduced parking requirements, density bonuses, and others. Consideration should be given to giving priority to jurisdictions that are providing local smart growth incentives.
PRINCIPLES FOR ESTABLISHING A SMART GROWTH INCENTIVE PROGRAM

Following adoption of the Regional Comprehensive Plan (RCP) and pending identification of funding resources, SANDAG will develop a Smart Growth Incentive Program to encourage development within the Smart Growth Opportunity Areas described in the classification matrix included as Attachment 1 of this report. At their last meeting, the Regional Planning Stakeholders and Technical Working Groups held an initial discussion on principles that should be used in establishing the criteria for the Smart Growth Incentive Program.

Generally, the working groups supported principles that center around priority for the following: regional transportation funding investments, additional residential capacity, demonstration projects, infrastructure improvements, planning grants, and projects that provide local incentives. A more detailed description of the draft principles will be distributed for discussion at the meeting.

The final RCP will include a listing and description of the principles to be used in developing the criteria for the Smart Growth Incentive Program.

The process for developing the criteria will involve the SANDAG Board of Directors, the Regional Planning Committee, and the Transportation Committee, with input from the Regional Planning Technical Working Group, the Regional Planning Stakeholders Working Group, the Cities/County Transportation Advisory Committee, and other relevant groups.
The following principles should be used in developing criteria for smart growth incentive programs that implement the Regional Comprehensive Plan.

1. Regional Funding for Transportation Investments that Support Smart Growth. In its development of the Regional Transportation Plan (RTP) and programming of transportation projects, SANDAG should ensure that its decisions regarding key regional transportation corridor investments give highest priority to implementation of smart growth by local jurisdictions in "smart growth opportunity areas," with a particular focus on opportunities for housing affordable to all income levels. Additionally, SANDAG should ensure that the design and implementation of its regional transportation facilities supports smart growth development by local jurisdictions.

2. Regional Funding for Smart Growth Infrastructure and Planning.
   a. Infrastructure Improvements. SANDAG should provide direct financial incentives to local communities for needed infrastructure improvements, such as transit access, community parking, bicycle and pedestrian circulation improvements, traffic calming, streetscape improvements, and others, in smart growth opportunity areas, using a variety of available funding sources.

   Demonstration Projects. SANDAG should initially focus on public infrastructure improvements for "ready-to-go" projects that will demonstrate smart growth principles and serve as a catalyst for additional smart growth development in key locations.

   b. Planning. SANDAG should provide technical assistance and/or planning grants to local jurisdictions to implement regional smart growth goals and policy objectives through local plans and regulations. Assistance could support preparation of general plan amendments, community plans, specific plans, and development regulations that facilitate smart growth development.

3. Local Incentives for Smart Growth. Local jurisdictions should provide incentives for appropriate development in smart growth opportunity areas, such as priorities for infrastructure improvements, fee reductions, priority processing of development plans, and others. SANDAG should give priority in its funding decisions to jurisdictions that are providing local smart growth incentives.

4. Funding for Other Smart Growth Activities. SANDAG should work with other agencies (e.g., California Department of Housing and Community Development (HCD), U.S. Environmental Protection Agency (EPA), U.S. Fish and Wildlife Service, and private foundations) to coordinate the development of programs that provide incentives for other types of smart growth activities, such as affordable housing production, habitat protection, and the like.