MEETING NOTICE
AND AGENDA

REGIONAL PLANNING
TECHNICAL WORKING GROUP
The Regional Planning Technical Working Group may take action on any item appearing on this agenda.

Thursday, March 10, 2005
1:15 to 3:15 p.m.
SANDAG, Seventh Floor Conference Room
401 B Street, Suite 800
San Diego, CA 92101-4231

Committee Chair: Gail Goldberg, City of San Diego
(619) 236-6361
GGoldberg@SanDiego.gov

Staff Contact: Susan Baldwin
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REGIONAL PLANNING TECHNICAL WORKING GROUP
Thursday, March 10, 2005

ITEM #

CONSENT

+1. SUMMARY OF THE FEBRUARY 10, 2005 REGIONAL PLANNING TECHNICAL WORKING GROUP MEETING (pp. 4-10)

The TWG should review and approve the February 10, 2005 meeting summary.

2. 2004 CONGESTION MANAGEMENT PROGRAM (CMP) UPDATE (Mario Oropeza)

SANDAG is required by State law to update the Congestion Management Program every two years. A draft 2004 CMP Update was e-mailed to the TWG last month for comments and no comments were received. Major changes in the 2004 Update include an updated CMP roadway network level of service (LOS) analysis, a new transit corridor analysis, and a proposed change in the process to address deficiency roadway segments. The TWG is asked to recommend approval of the 2004 CMP to the Regional Planning Committee.

REPORTS

3. RECOGNITION OF JOAN VOKAC, COUNTY OF SAN DIEGO

After 30 years of public service, Joan Vokac is retiring from the County of San Diego. During her time with the County, Ms. Vokac participated in many planning activities at SANDAG. A certificate of recognition will be presented in honor of Ms. Vokac.

4. SHOWCASING SMART GROWTH: SMART GROWTH IN SOLANA BEACH (Greg Shannon, Representative for Shedonna / NCTD Solana Beach Mixed Use Project)

The TWG has received periodic presentations featuring local smart growth efforts throughout the region. A presentation will be made on the mixed use project currently proposed at the North San Diego County Transit Development Board (NCTD) COASTER station in Solana Beach.

5. APPOINT MEMBER OF DEMOGRAPHIC AND ECONOMIC FORECASTING MODEL (DEFM) TECHNICAL WORKING GROUP/UPDATE ON THE SERIES 11 2030 REGIONAL GROWTH FORECAST (Ed Schafer)

SANDAG staff will update the TWG on the Series 11 2030 Regional Growth Forecast. The TWG should appoint a representative to the DEFM Technical Working Group.
6. SANDAG BOARD ACTION ON THE FINAL REGIONAL HOUSING NEEDS ASSESSMENT (RHNA) (pp. 11-13)

Staff will report on the SANDAG Board action on the Final RHNA. The memorandum approved by the Board in conjunction with the adoption of Modified Alternative 1 is attached. Alternative 3, which is referred to in the memorandum, also is attached. The TWG should discuss the memorandum adopted with the final RHNA, and appoint representatives to an ad hoc RHNA working group.

7. PILOT SMART GROWTH INCENTIVE PROGRAM (Stephan Vance) (pp. 14-25)

The ad hoc working group that is developing the Pilot Smart Growth Incentive Program has agreed upon draft project selection criteria and program administrative procedures. The TWG is asked to recommend approval of the criteria and program guidelines to the Regional Planning and Transportation Committees.

8. PRELIMINARY DRAFT SMART GROWTH CONCEPT MAP AND ASSUMPTIONS FOR GENERIC OVERLAYS (Carolina Gregor) (pp. 26-29)

Based on input from meetings with local jurisdictions over the past month and a half, a Preliminary Draft Smart Growth Concept Map will be presented at the meeting for the TWG's review and comment. Additionally, the TWG should discuss the proposed land use assumptions to be included in the generic overlays for the potential smart growth areas.

9. WORK PROGRAM FOR REGIONAL TRANSPORTATION PLAN (RTP) UPDATE (Michael Hix) (pp. 30-39)

This item provides an overview of the work program and schedule for updating the RTP. A technical RTP update is expected in 2006 to meet the requirements of the normal three-year update cycle; a more comprehensive RTP update is anticipated in 2007. The 2007 update, which will be based on the Series 11 2030 Regional Growth Forecast, will incorporate the results of the Independent Transit Planning Review and the strategic initiatives from the adopted Regional Comprehensive Plan. The TWG should provide input on this item.

10. UPDATE ON LEAGUE OF CALIFORNIA CITIES HOUSING/GENERAL PLAN TASK FORCE (Bob Leiter and TWG Chair Gail Goldberg)

SANDAG staff and Gail Goldberg will update the TWG regarding the work of the League of California Cities Housing/General Plan Task Force.

11. ADJOURNMENT AND NEXT MEETING

The next regularly scheduled meeting will be held on Thursday, April 14, 2005, from 1:15 to 3:15 p.m.
March 10, 2005

TO: Regional Planning Technical Working Group (TWG)

FROM: SANDAG Staff

SUBJECT: Summary of the February 10, 2005 TWG Meeting

ACTION: APPROVE

Agenda Item #1: Welcome and Introductions

Gail Goldberg, City of San Diego, chaired the meeting. Self-introductions were conducted.

PUBLIC COMMENTS AND COMMUNICATIONS

Andy Hamilton, Air Pollution Control District, announced that Walk San Diego, a local pedestrian advocacy group, is holding its annual “Golden Footprint” awards on February 25th to recognize outstanding pedestrian friendly projects and built environments in the San Diego Region.

CONSENT ITEMS (2-5)

Agenda Item #2: Summary of the January 13, 2005 TWG Meeting

Dave Witt, City of La Mesa, requested that the minutes of the January 13th TWG Meeting be amended on page 8, paragraph 4, to include the additional comments he made at that time. Mr. Witt would like the minutes to reflect that during discussion of the Regional Housing Needs Assessment, he stated that, “it is important to emphasize that some jurisdictions have made a choice to encourage a wider range of housing opportunities in an attempt to meet both local and regional objectives. Those jurisdictions that are making the choices needed to support regional objectives should receive clear economic incentives when regional resources are being allocated.”

Agenda Item #3: Summary of the January 26, 2005 Special TWG Meeting

Agenda Item #4: Membership of the new Regional Planning Stakeholders Working Group

Agenda Item #5: 2004 CMP Update

A motion and second were made to approve both the amendment to Item #2 proposed by Mr. Witt and the remaining items on the consent calendar. The motion passed unanimously.
Agenda Item #6: Pilot Smart Growth Incentive Program

Stephan Vance of SANDAG reported that the ad hoc working group assisting staff with development of the Pilot Smart Growth Incentive Program has reached a general consensus on project selection criteria. The criteria will ensure that projects receiving incentive program funding help achieve the Pilot Incentive Program’s primary goal of implementing a set of demonstration projects that will serve as examples of smart growth development consistent with the goals of the RCP.

The ad hoc working group has divided the Pilot Smart Growth Incentive Program evaluation criteria into two categories: (1) Project Screening Criteria; and (2) Project Evaluation Criteria.

The Project Screening Criteria determine a project’s basic program eligibility and must be met before a project can be reviewed further. Meeting the project selection criteria requires: (1) demonstration of local commitment in the form of a resolution authorizing the application, and committing local staff resources and funding to the project; (2) local funding commitment; and (3) eligibility under the pilot incentive program’s funding source, the federal Transportation Enhancement (TE) program.

The Project Evaluation Criteria are divided into three categories: (1) Project Readiness; (2) Smart Growth Area Land Use Characteristics; and (3) Quality of Proposed Project.

The Project Readiness criteria ensure that projects can be implemented in a short time-frame and can be delivered consistent with the requirements of the TE program. The farther along a project is in the development process, the higher priority it receives.

The Smart Growth Area Land Use Characteristics Criteria encourage projects located in areas that are consistent with the seven smart growth place types outlined in the Smart Growth Matrix of the RCP. These criteria evaluate projects based on the intensity of surrounding development, land use and transportation characteristics, and urban design characteristics.

The Quality of Proposed Project criteria evaluate the specific features of the candidate projects and give priority to the projects that improve the transit environment, improve pedestrian and bicycle access, and incorporate streetscape enhancements, traffic calming features, and parking.

The Incentive Program also features a Matching Funds bonus category in which projects that have a higher funding commitment of matching funds receive a higher priority. The TE program requires a minimum 11.47 percent local match. Encouraging local agencies to providing matching funds over the minimum requirement will help the pilot program fund larger projects. The ad hoc working group felt that the larger the projects, the greater the impact the pilot program will have.
In addition to these project evaluation criteria, staff reported that affordable housing criteria have been added. Candidate projects with an affordable housing component will receive additional points.

When evaluating projects, each component of each project evaluation criteria category would be ranked on a scale from one to five. The criterion could be given more or less importance by multiplying the evaluation score by a weighting factor. Staff reported that the ad hoc working group has not yet reached a consensus on weighting factors.

The following comments were made:

Joan Vokac, County of San Diego, asked if pedestrian design criteria will receive a higher weighting in the rural areas due to the lack of transit service. She also voiced concern that the incentive program is structured in such a way that the relatively lower densities of rural communities will not allow them to compete with other areas for funding. Staff responded that pedestrian design criteria will not receive a higher weighting in the rural areas, and that intensity of a project’s development will be evaluated according to smart growth place type, not in comparison with projects of other place type categories.

Gail Goldberg, City of San Diego, reminded the group that the pilot program’s $17 million in Transportation Enhancement funds will only be enough to fund a limited number of smart growth demonstration projects, and asked staff to anticipate how many projects will receive funding. Staff replied that the program will allocate up to a maximum of $2 million per project, funding approximately eight projects in all. The goal is to fund projects of various place types in various parts of the region.

Dave Witt, City of La Mesa, asked when the pilot incentive program will be ready to fund smart growth demonstration projects, and if the $17 million can be allocated at once if several projects are ready simultaneously. Staff responded that the goal is to establish final program criteria and guidelines in March, have the Pilot Smart Growth Incentive program approved by the SANDAG Board in April, issue a call for projects in May, and make the funding available beginning in fiscal year 2006, and through fiscal year 2009. The $17 million must be spent over the five-year course of the pilot program, and the funds will be programmed in the event of several projects becoming ready simultaneously. Mr. Witt advocated for disproportionately high distribution of the funds in the beginning of the program, instead of equal allocation over five years, to ensure that demonstration projects are built quickly.

Jim Sandoval, City of Chula Vista, commented that lifting the $2 million funding cap might be necessary to ensure that projects receive enough money to become significant demonstrations of smart growth. Mr. Sandoval expressed support for integrating the $17 million of the pilot program with the $280 million of the TransNet Smart Growth Incentive Program if it seems unlikely the demonstration projects will be funded and built in a timely fashion.

Ms. Goldberg advocated use of the $17 million to provide incentives for the smart growth characteristics not being supplied in the market: high-intensity development and affordable
housing. She cautioned that $17 million is insufficient for equal distribution amongst every candidate project, and many projects will not receive pilot incentive program funds.

In response to a comment from Dennis Turner, City of Carlsbad, staff clarified that the $17 million in Transportation Enhancement funds must support capital projects, and cannot be used for planning purposes.

Staff agreed with the comment from Ed Kleeman, City of Coronado, that the pilot incentive program should fund projects in a variety of smart growth place types in various subregions.

Patrick Richardson, City of Vista, cautioned that the project readiness criteria may result in the funding of projects too far along in the development process to incorporate desired smart growth characteristics. Ms. Goldberg suggested that project readiness should be a screening criterion instead of an evaluation criterion. She commented that the evaluation criteria should focus on smart growth characteristics.

Staff explained that project readiness is an evaluation criterion so that the pilot incentive program will not eliminate projects that are close to being constructed.

Mr. Turner agreed with the various categories and weighting factors, and suggested increasing the weighting factor for project readiness.

Mr. Witt was also supportive of the various criteria, and cautioned against giving too high of a priority to projects with a higher commitment of matching funds. He feels the pilot incentive program should be structured so that projects truly in need of financial assistance are funded. Staff expressed confidence that the pilot incentive program will provide funds to such projects.

Nancy Bragado, City of San Diego, would like to promote increased intensity of development by increasing the weighting factor of such criteria, especially in relationship to urban design criteria. She added that all projects with at least 45 dwelling units per acre in any of the smart growth place types should receive the maximum points allowed.

Mr. Kleeman suggested seeking private funding sources to increase the success of the pilot incentive program.

Mr. Witt commented that the program should reward jurisdictions that improve upon their normal patterns of development.

Mr. Richardson feels that the region will benefit most by implementing smart growth in suburban areas. He would like to see increased promotion of smart growth in such areas.

In response to a question from Barbara Redlitz, City of Escondido, staff clarified that projects receiving the incentive program's Transportation Enhancement funds are subject to the requirements of the National Environmental Policy Act (NEPA).
Patrick Murphy, City of Encinitas, sees potential for the demonstration projects to be used as tools to promote smart growth in interested communities. Mr. Murphy also expressed support for the funding of projects at various densities in various subregions.

Agenda Item #7: Showcasing Local Examples of Smart Growth: Smart Growth in Otay Ranch

The Regional Planning Committee (RPC) has asked for periodic presentations on local smart growth efforts occurring in the region; these presentations are also being shared with the TWG. Per this request, local smart growth planning and development activities taking place in Otay Ranch, a community within the City of Chula Vista, were presented to the TWG by Rock Rosaler with the City of Chula Vista, and Kim Kilkenny of The Otay Ranch Companies.

Mr. Kilkenny explained that the Otay Ranch is divided into 12 villages, and that his presentation would focus on the Village of Heritage. From the outset, the Otay Ranch Companies were challenged with finding a way to improve upon the automobile dominance, segregation of uses, and other problems of conventional development. Three goals were developed in an effort to make the Otay Ranch Villages superior to conventional development: (1) Environmental Stewardship, (2) Provide facilities concurrent with need, and (3) Create a Sense of Place.

Meeting the goal of environmental stewardship consisted of establishing a 17 square mile managed preserve system, which later became part of the Multiple Species Conservation Program. Careful planning and location of parks, schools, pedestrian bridges, fire stations, and other infrastructure have ensured that facilities are concurrent with need. In order to create a sense of place, the Otay Ranch was divided into 12 villages, each approximately one-mile square. At the heart of each village are transit stations, mixed use retail centers, activity centers, and approximately half the residential population of that village. The proximity of transit, activity centers and residences, combined with narrow, pedestrian friendly streets creates the community’s sense of place.

Special attention was also given to various modes of transportation. Four-to-six lane arterials expedite automobile traffic in-and-out of the villages, while the promenade streets, pop-through cul-de-sacs, pedestrian bridges, paseos, and regional trails encourage pedestrian activity. A right-of-way for Bus Rapid Transit (BRT) has also been reserved to connect the villages with the region’s public transportation system.

Another unique feature of the Otay Ranch Villages is the variety of housing choices. The villages feature affordable housing units reserved for certain income groups, multifamily units, small lot single family detached homes, as well as traditional single family detached homes.

In discussing the major lessons learned from the Village of Heritage experience, Mr. Kilkenny reported that it is difficult for mixed use retail centers to compete against larger retail areas. Placing the majority of parking behind the buildings made it invisible to drivers, and hurt retail business. Residents will have to begin walking to shops for mixed use retail uses to be competitive in the marketplace.
Mr. Kilkenny also reported that Otay Ranch was very difficult to build from a financial perspective. Lower-density conventional development would have yielded more financially beneficial outcomes for the Otay Ranch Companies, but they were committed to improving upon conventional development. Mr. Rosaler added that studies published by the Congress for New Urbanism indicate that property values are increased by the type development implemented in the Otay Ranch. The attributes applied in the Heritage Village will be applied in the remaining villages, with additional improvements as identified by the lessons learned.

Agenda Item #8: Revised Draft Regional Comprehensive Plan Baseline Performance Monitoring Report

Beth Jarosz of SANDAG reminded the Working Group that the preparation of the Baseline Performance Monitoring Report is one of the key strategic initiatives to implement the Regional Comprehensive Plan (RCP). At its December meeting, the TWG provided comments on the first draft RCP baseline monitoring report. Staff has revised the report to include the comments, and is asking the TWG for additional feedback and to formulate a recommendation to the Regional Planning Committee.

The following comments were made on the revised report:

Dennis Turner, City of Carlsbad, asked why per capita water consumption cannot be measured accurately, as per capita energy consumption is. Staff responded that per capita water usage is difficult to accurately measure because the amount of residential users using their water for agricultural purposes is unknown. Mr. Turner replied that coming up with an alternative approach to measuring water consumption in some capacity is a critical component in monitoring performance of the RCP.

Dana Friehauf, San Diego County Water Authority, stated that water consumption rates vary tremendously by amount of rainfall, making actual per capita rates difficult to measure. In response to comments from Ms. Goldberg, Dana Friehauf promised to look into developing a per capita water consumption methodology that accounts for weather and water used for agricultural purposes.

Joan Vokac, County of San Diego, observed that local reservoirs appear to be omitted from the water quality indicators. Ms. Vokac also asked how groundwater usage should be interpreted. Dana Friehauf answered that groundwater usage should be maximized, but not to the point of detriment. Ms. Friehauf added that surface water is influenced by rainfall, and therefore measuring its usage is difficult.

Ed Kleeman, City of Coronado, commented that the miles and acres of impaired water bodies indicator should be supplemented with information on the level of impairment.

Mr. Turner stated that the amount of solid waste imported from other areas, exported to other areas, and produced in the region should be measured to assess landfill capacity. Staff responded that the exporting of waste makes capacity difficult to measure.
Ms. Goldberg ended the discussion because of the lack of quorum. She stated that the comments were centered on the issues of landfill capacity, water conservation, and groundwater usage, and directed staff to make revisions to the baseline monitoring report based on these comments.

The next steps in the baseline performance monitoring process will be to establish short- and long-term targets for each of the indicators, and begin collecting annual data for the indicators.

Agenda Item #9: Update to the 2030 Regional Growth Forecast: 2007 Regional Transportation Plan

Ed Schafer of SANDAG reported that it will begin preparing an update to the 2030 Regional Growth Forecast in support of the 2007 Regional Transportation Plan (RTP). The forecast will be based entirely on the current plans and policies of the region’s jurisdictions.

Staff will visit each jurisdiction with a series of maps and illustrations to identify any lands that might be developed or redeveloped while the 2030 Regional Growth Forecast is being updated. Staff wants the plans and policies used to compute the forecast to be as accurate as possible.

Letters to the jurisdictions’ Planning Directors regarding the upcoming meetings are forthcoming.

The 2030 Regional Growth Forecast update will be a standing item on future TWG agendas.

Agenda Item #10: Adjournment and Next Meeting

The next meeting of the Regional Planning Technical Working Group will be held March 10, 2005 from 1:15 to 3:15 p.m. in the 7th Floor Conference Room.
March 3, 2005

TO: Regional Planning Technical Working Group
FROM: Susan Baldwin, SANDAG Staff
SUBJECT: SANDAG Board Action on the Final Regional Housing Needs Assessment
ACTION: DISCUSSION

On February 25, 2005, the SANDAG Board of Directors approved the final Regional Housing Needs Assessment (RHNA) for the 2005-2010 housing element cycle. The RHNA contains the total number of housing units (107,301) that the 18 cities and county government should plan for in their housing elements. The RHNA also allocates each jurisdiction’s housing need into four income categories: very low, low, moderate, and above moderate. The Board approved Modified Alternative 1 (Attachment 1), which shows the allocation of the regional housing need by jurisdiction and by income category.

In conjunction with Modified Alternative 1, the Board also approved incentives for jurisdictions that plan for and produce lower income housing, and that submit an annual report verifying compliance with their adopted housing elements and housing production by income category (Attachment 2).

SANDAG will be including the Final RHNA numbers in the Regional Housing Needs Statement, which will be distributed in April.

Recommendation

The Technical Working Group (TWG) should discuss two items relating to the RHNA:

1. The implementation of the memorandum associated with the adoption of the Final RHNA.
2. Convening a group of TWG, Regional Planning Stakeholders Working Group, and Regional Housing Task Force members to discuss issues related to the next RHNA.

As we developed the RHNA during the past two years, a number of ideas for changes to the RHNA process were discussed. SANDAG would like to convene an ad hoc working group to identify ways we can improve the process for the next cycle. If state law does not change, the next RHNA process would start in about three years (July 1, 2008), two years before the due date for the 2010-2015 housing element cycle. The TWG should appoint members of the group who would like to participate in this discussion. Two to three meetings are anticipated starting in late March or early April.

Attachments: RHNA Table with Modified Alternative 1 and Alternative 3 Memorandum from Mayor Lori Holt Pfeiler, Mayor Steve Padilla, and Councilmember Jim Madaffer
February 25, 2005

TO: SANDAG Board of Directors
FROM: Mayor Lori Pheiler, Mayor Steve Padilla, and Councilmember Jim Madaffer
SUBJECT: Agenda Item No. 12 – Final Regional Housing Needs Assessment (RHNA)

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

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

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

2. In addition to the current Pilot Smart Growth Incentive Program, for all future discretionary funding allocated to local agency projects by SANDAG (following the adoption by jurisdictions of housing elements for 2005-2010), the following criteria shall apply:
   a. In order to qualify for such funding, a jurisdiction will be required to demonstrate that they are in compliance with provisions of their adopted housing element which set forth their commitment to providing adequate multi-family zoned land or other actions necessary to accommodate their share of lower income housing under the adopted RHNA.
   b. Incentive points (a minimum of 25 points out of 100 possible) will be given to projects in jurisdictions in which lower income housing units are being produced in accordance with the housing unit figures contained in Alternative 3 (Attachment 2, Column 13).
   c. In order to verify compliance with these provisions, each jurisdiction shall annually submit a report to SANDAG indicating their progress in complying with requirements of their housing element, as well as actual production of housing units within their jurisdiction by income category, during the preceding year.

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<td>22</td>
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</tr>
<tr>
<td>Vista</td>
<td>2,267</td>
<td>511</td>
<td>305</td>
<td>428</td>
<td>1,023</td>
<td>510</td>
<td>388</td>
<td>428</td>
<td>941</td>
<td></td>
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<tr>
<td>Unincorporated Area - Original</td>
<td>12,358</td>
<td>3,217</td>
<td>2,251</td>
<td>2,336</td>
<td>4,554</td>
<td>2,829</td>
<td>2,149</td>
<td>2,336</td>
<td>5,045</td>
<td></td>
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<tr>
<td>Unincorporated Area - Revised*</td>
<td>12,358</td>
<td>2,799</td>
<td>1,959</td>
<td>2,336</td>
<td>5,263</td>
<td>2,476</td>
<td>1,881</td>
<td>2,336</td>
<td>5,666</td>
<td></td>
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<tr>
<td>San Diego Region</td>
<td>107,301</td>
<td>24,144</td>
<td>18,348</td>
<td>20,280</td>
<td>44,529</td>
<td>24,143</td>
<td>18,348</td>
<td>20,280</td>
<td>44,530</td>
<td></td>
</tr>
</tbody>
</table>

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

**Alternative 3 was accepted by the SANDAG Board for distribution on September 24, 2004.

Totals may be affected by rounding.

February 25, 2005
March 3, 2005

TO: Regional Planning Technical Working Group
FROM: SANDAG Staff
SUBJECT: Draft Pilot Smart Growth Incentive Program Criteria and Guidelines
ACTION: RECOMMEND

Introduction

The Pilot Smart Growth Incentive Program (SGIP) was originally proposed in SANDAG’s Regional Transportation Plan, MOBILITY 2030. It is a precursor to the longer term smart growth incentive program called for in the Regional Comprehensive Plan that will be funded by the TransNet extension. An ad hoc working group consisting of Regional Planning Technical Working Group (TWG) and Cities/County Transportation Advisory Committee (CTAC) members has been collaborating with SANDAG staff to develop project evaluation criteria for the Pilot SGIP.

The Regional Planning and Transportation Committees discussed the draft project evaluation criteria for the pilot program at a joint meeting on January 21, 2005. At the February TWG meeting, SANDAG staff presented the draft criteria for Pilot SGIP, and responded to questions and comments from TWG members. CTAC also has previously reviewed and discussed the draft criteria.

Since these meetings, the ad hoc working group has met and recommended changes to the project evaluation criteria in response to comments from the two Policy Advisory Committees and the working groups. The ad hoc group also has helped develop the recommended weighting factors for each criterion.

Staff also has prepared draft program guidelines, and is in the process of developing the program’s application form based on the proposed project evaluation criteria. The revised criteria and program guidelines are included as Attachment 1 to this report.

In its February 25, 2005 approval of the final Regional Housing Needs Assessment (RHNA), the Board of Directors directed staff to modify the SGIP project evaluation criteria to award “bonus points” for affordable housing. The bonus points are to be awarded to jurisdictions whose 1999 percentage of lower income households is higher than the regional average. The attached project evaluation criteria and guidelines do not reflect this February 25 policy directive. SANDAG staff will provide an alternative evaluation criteria matrix at the March 10, 2005 TWG meeting that responds to this requirement.
Recommendation

The RPTWG is asked to comment on the proposed criteria and program guidelines, and to recommend that the Regional Planning Committee approve the revised criteria and program guidelines for implementing the Pilot SGIP.

Discussion

Program Guidelines. The draft program guidelines (Attachment 1) were developed to meet the federal state and local requirements of the federal Transportation Enhancement (TE) program that will be the funding source for Pilot SGIP. They also establish the application requirements, and in general terms, provide guidance on how the evaluation criteria will be applied to score and rank projects. The application form is being designed to ensure that each application includes the information needed for a thorough evaluation of the projects. The guidelines also explain the application requirements and evaluation criteria, and describe the project selection process.

Project Evaluation Panel. As proposed in the draft guidelines, the projects will be scored by a project evaluation panel. This panel would include SANDAG staff and individuals selected from SANDAG’s newly formed Regional Planning Stakeholders Working Group (SWG). The objective is to establish an evaluation panel with individuals familiar with the urban form and design principles of smart growth. SANDAG will recruit panel members with a background in urban design, land development, engineering, public transit, bicycling, and walking. If all those skills cannot be found on the SWG, staff would seek volunteers from the private sector and non-governmental organizations. The panel members should have no connection to any of the projects being evaluated.

Revised Evaluation Criteria. There are two major differences between the project evaluation criteria matrix presented to the TWG at its February 10, 2005 meeting and the attached matrix. First, the matrix now includes weighting factors for each criterion. The matrix divides the evaluation criteria into four sections: Project Readiness, Smart Growth and Land Use Characteristics, Quality of Proposed Project, and Matching Funds. The weighting factors distribute the points between these sections as follows:

A. Project Readiness 13%
B. Smart Growth and Land Use Characteristics 39%
C. Quality of Proposed Project 35%
D. Matching Funds 13%
Total 100%

The second major change is that affordable housing has been added as a criterion to Section B (Smart Growth and Land Use Characteristics). The addition of a criterion addressing affordable housing was requested at the joint meeting of the Regional Planning and Transportation Committees. However, the matrix does not reflect the Board’s direction on February 25, 2005, during the RHNA public hearing to provide 15 bonus points for affordable housing. A revised matrix will be distributed at the March 10, 2005 TWG meeting that meets this requirement.
Program Application Forms. Staff is still in the process of developing the program application forms. They will be designed to relate directly to the evaluation criteria to ensure the evaluation panel has all the information it needs to score the projects. Once a draft form has been completed, it will be reviewed by the Pilot SGIP’s ad hoc working group.

Next Steps

If the TWG recommends approval at the March 10, 2005 meeting, the Pilot SGIP would be presented at a joint meeting of the Regional Planning and Transportation Committees scheduled for April 1. The SANDAG Board of Directors is scheduled to approve the project evaluation criteria and program guidelines at its April 22 meeting.

Once approved, SANDAG would issue a call for projects. Project applicants would have approximately 45 days to submit applications. The project evaluation panel would be formed to review and rank the projects. The panel’s recommendations would likely go to the Regional Planning and Transportation Committees for action during the first week of July.

Following approval, the projects must be submitted as a State Transportation Improvement Program (STIP) amendment to the California Transportation Commission. This is typically a 90-day process. Following the STIP amendment, successful applicants would be able to begin working with the Caltrans Office of Local Assistance to receive authorization to begin the project.

Attachments
PILOT SMART GROWTH INCENTIVE PROGRAM
DRAFT PROGRAM GUIDELINES

PROGRAM DESCRIPTION

The Pilot Smart Growth Incentive Program (SGIP) funds transportation infrastructure improvements that support smart growth development. Project types could include improvements to pedestrian, bicycle and transit facilities, traffic calming, streetscape enhancements, and other innovative smart growth-supporting infrastructure. These projects should encourage pedestrian, bicycle and transit trips; support a community’s larger infill development or revitalization effort; and provide for a wider range of transportation choices, improved internal mobility, and stronger sense of place. Funds can be used for preliminary engineering (design and environmental), right-of-way acquisition, and construction.

These Program Guidelines describe the application and call for projects process.

WHO CAN APPLY?

SGIP grants are awarded on a competitive basis. Local governments, transit operators, and other public agencies are eligible recipients of the federal funds. Nonprofit and community-based organizations may be partners with government agencies, but cannot apply directly for the funds. Grant recipients will be required to take the capital project through the federal-aid process with Caltrans Local Assistance and meet both state and SANDAG “use it or loose it” requirements for the funds. In addition, grant recipients may be required to attend a workshop on project implementation and the federal-aid process.

HOW MUCH FUNDING IS AVAILABLE?

There is approximately $17 million in federal Transportation Enhancement (TE) Funds available for the Pilot SGIP. Requested grants should range between $200,000 to $2 million per project. The TE funds are available for up to 88.53 percent of the total project cost. Applicants must provide a minimum local match of 11.47 percent.

ELIGIBLE ACTIVITIES

Project activities eligible for funding include bicycle and pedestrian paths and bridges; on-street bike lanes; pedestrian plazas; pedestrian street crossings; streetscape enhancements such as median landscaping, street trees, lighting, street furniture; traffic calming design features such as pedestrian bulb-outs or traffic circles; transit stop amenities; way-finding signage; and gateway features. Other project types such as parking also may be eligible provided the TE funds can be swapped for another funding source.

Applicants should check with SANDAG and Caltrans Office of Local Assistance for help determining project eligibility. Regardless of the project type, SANDAG is looking for capital projects that are well-designed, expand transportation options, result in numerous community benefits, and are part of a community’s broader revitalization and development efforts.
SMART GROWTH AREAS

Projects funded by the Pilot Smart Growth Incentive Program should be in existing or future smart growth areas. SANDAG has just begun the process of working with local jurisdictions to identify these areas as part of the development of the Smart Growth Concept Map called for in the Regional Comprehensive Plan (RCP). Until that map is developed, the pilot program will evaluate projects based on criteria that address how well the project area exemplifies the smart growth place type characteristics described in the RCP. These characteristics include mixed use, higher intensity, walkable development that is associated with an existing or planned regional transit facility or transit corridor. Section II-B of the project evaluation criteria addresses these characteristics.

The RCP clearly defines six smart growth place types that require a connection to regional transit service; in addition a rural community smart growth place type also is included. Applicants should be able to classify their project sites within one of these smart growth area types. The selection criteria favor projects in locations where existing or planned development best exemplifies one of those place types.

HOW WILL PROJECTS BE EVALUATED?

The primary goal of the Pilot Smart Growth Incentive Program is to deliver a set of constructible projects that will serve as models for how public infrastructure funding can be used to encourage smart growth development. To achieve that goal, the evaluation criteria focus on constructability, the qualities and characteristics of the existing or planned land uses and transportation facilities in the project area, the qualities of the project itself, and available matching funds.

The evaluation criteria have two main components: eligibility screening criteria, and project evaluation criteria. Once a project has passed the eligibility screening, it will be scored based on the project evaluation criteria. These criteria are included in the Pilot SGIP matrix attached to the application materials.

Each project evaluation criterion is ranked on a scale from 0 to 5. Each criterion is then weighted by a factor from 1 to depending on its relative importance.

The “project,” is the capital improvement that would be supported by the Pilot SGIP grant. It could include any number of project types eligible under the federal TE program, including bicycle and pedestrian improvements, streetscape enhancements, enhancements to transit facilities, and other types. A candidate project could include one or more of these types of improvements, and would be evaluated based on how well it proposes to execute each type of improvement.

The eligibility screening and project evaluation criteria are discussed in more detail below.

Section 1: Project Screening Criteria

Project Screening Criteria are primarily used to determine basic program eligibility and ensure that the applicant is committed to the project. Three criteria must be met before a project can be evaluated further: (1) Applicants must provide a resolution authorizing the
application and committing matching funds and staff resources to the project from a local Board or Council; (2) applicants must certify that other necessary funding is committed to the project; and (3) eligibility under the federal funding program guidelines must be met.

Applicants with questions about project eligibility should contact SANDAG (619-699-1924) or Caltrans Office of Local Assistance (858-616-6525). The resolution from the Board or Council may be submitted after the application deadline, provided it is received before the project evaluation panel makes its recommendation on project priorities.

Section 2: Project Evaluation Criteria

PART A. The Project Readiness Criterion is used to evaluate whether the capital project will be able to meet its schedule as stated in the application. The further along the project is in the project development process, the more points the project would earn. Project Readiness has been weighted so as to reflect the relative importance of this evaluation criterion. Only projects that are ready for construction will score the highest in this category and achieve the full 15 points allotted.

PART B. Smart Growth Area Land Use Characteristics are used to evaluate how well the existing or planned land uses and transportation system characteristics in the project area reflect its smart growth place type. Projects supporting residential development that exceeds minimum density levels for its smart growth place type will score the highest in the Intensity of Development category.

In order to achieve the highest score in the Land Use and Transportation Characteristics of Project Area category, the project must be in an area that provides, or is planned to provide, a mix of uses combined with the appropriate transportation system characteristics. Special emphasis is placed on areas focused around regional transit facilities.

The Urban Design Characteristics of the project will be evaluated to determine how well the area reflects the smart growth design principles in the RCP. For additional guidance, refer to SANDAG’s Planning and Designing for Pedestrians.

The criterion Related Land Development evaluates how well new land development or redevelopment directly related to the proposed project reflects smart growth development principles, particularly in terms of providing for additional housing. To be directly related, the project must abut or directly serve the new land development.

Finally, proposed projects directly related to land development that includes Affordable Housing will be scored based on the quantity of affordable housing provided. “Affordable housing” means housing that serves extremely low, very low, or low income households (between 0 – 80 percent of area median income adjusted for household size). Affordable housing costs are defined in Section 6918 for renters and Section 6920 for purchasers of Title 25 of the California Code of Regulations, and in Sections 50052.5 and 50053 of the Health and Safety Code, or by the applicable funding source or program. NOTE: This criterion may be subject to change, based on policy direction provided by the SANDAG Board on February 25, 2005.
PART C. Quality Of Proposed Project scoring is based on an evaluation of the quality of the various kinds of improvements that may be included in project. Pedestrian Access and Transit Facility Improvements are key components of quality smart growth areas and have been weighted accordingly. Maximum points in these categories are awarded based on the quality of the project design, and how well the project connects the community and its activity centers to public transit. Bicycle Access Improvements will be evaluated similarly.

Streetscape Enhancements and Traffic Calming Features also impact the quality of the project. Streetscape Enhancements will be scored according to the quality of the proposed design, and the benefit to the pedestrian environment. Traffic Calming Features should effectively reduce vehicular speeds while also enhancing the street environment for pedestrians and bicyclists.

Finally, Parking Improvements ensure that there is an appropriate level of auto access to regional transit and the immediate project area. Projects that include parking will be evaluated on how well the parking is integrated into the community. It should provide enough parking to meet expected demand, taking into account the potential for increases in transit and walking trips. Because parking is not an eligible expense under the TE program, applicants submitting parking improvements for funding should meet with or contact SANDAG staff prior to submitting an application to discuss fund swaps and other strategies for how the project might be included in the Pilot SGIP.

PART D. Matching Funds points are awarded to projects based on the amount of matching funds provided by the local jurisdiction from either public or private sources. Private sources of matching funds must be committed through an approved assessment or impact fee, and must be available at the time the project will be constructed. Points are awarded by multiplying the percentage of matching funds times a weighting factor of 20, up to a maximum of 15 points. The percentage of matching funds is the ratio of the matching funds to the total SGIP project cost.

WHO WILL SCORE THE PROJECTS?

A panel that includes SANDAG staff and people chosen from SANDAG’s Regional Planning Stakeholders Working Group will rank the projects. This evaluation panel will include people with knowledge of smart growth design principles and its components. SANDAG will recruit panel members with a background in urban design, land development, engineering, public transit, bicycling, and walking. To the extent possible, the panel also should represent the diverse subareas of the region.

SMART GROWTH INCENTIVE PROGRAM APPLICATION PROCESS

Step 1: SANDAG issues a call for projects. Applications will be due within approximately 45 days.

Step 2: Applicants submit a project proposal to SANDAG for funding consideration. The application must be completed in full for the project to be considered for funding.
Step 3: SANDAG staff, with the assistance of Caltrans Office of Local Assistance, will evaluate the projects for funding eligibility. Next, SANDAG will evaluate project proposals with the assistance of the project evaluation panel. The evaluation panel will score each project based on its merits relative to the other projects submitted. Once all the projects have been scored, they will be ranked based on their score. The evaluation panel will then review the project rankings with respect to the following program goals:

- How well do the top-ranked projects represent the various smart growth place types identified in the RCP?
- Do the top-ranked projects demonstrate the viability of smart growth development throughout the San Diego region?

In addition, the panel will recommend a prioritized list of projects for a waiting list. In the event that one or more of the recommended projects loses its funding for failure to meet its delivery schedule or other reason, a project from the waiting list could be funded based on its priority and the amount of funding available.

Step 4: Based on the recommendations of the evaluation panel, and funding availability of the overall program, SANDAG staff will make a funding recommendation to the SANDAG Regional Planning and Transportation Committees.

Step 5: Following approval of the list of Pilot SGIP projects, SANDAG will submit the projects to the California Transportation Commission (CTC) as an amendment to the State Transportation Improvement Program (STIP). This process requires a Caltrans review of the projects, and a 60-day public notice period prior to CTC action.

Step 6: Following the CTC’s approval of the STIP amendment, grant recipients will attend a workshop on project implementation and the federal-aid process where SANDAG and Caltrans Office of Local Assistance will discuss their respective roles for the Pilot SGIP. Grantees must comply with SANDAG’s Use-It-or-Lose-It Policy for the TE program (attached), and the Federal Highway Administration’s federal-aid process.
1. Quarterly Progress Report: Each project sponsor shall submit a quarterly progress report consisting of the following:
   
a. Accomplishments in the current quarter;
   b. Anticipated progress next quarter;
   c. Pending issues and recommended resolutions;
   d. Current schedule adhering to the two major milestones and nine intermediate milestones; and
   e. Status of budget, including any updates on project cost estimate.

2. Milestones and Budget: SANDAG staff will monitor the budget and all eleven (11) milestones shown below.
   
   - Start Environmental Studies
   - Draft Environmental Document
   - Final Environmental Document*
   - Obtain Required Permits
   - Begin Design Engineering
   - Complete Plans, Specifications, and Cost Estimates
   - Start Right-of-Way Acquisition
   - Right-of-Way Certification
   - Ready to Advertise
   - Award Construction*
   - Project Completion (project open for use)

*major milestones

3. Project Delays and Extensions up to One Year

   - Should any of the intermediate milestones fall behind schedule, the project sponsor shall demonstrate to SANDAG staff that the major milestone schedules will still be met.
   - Should any of the major milestones fall behind schedule, the project sponsor can request an extension of up to one year.
   - An extension request of up to six months can be approved administratively by SANDAG staff. Requests for extensions of more than six months but less than one year in total shall be determined by the Transportation Committee.
   - The project sponsor seeking the extension must demonstrate an ability to succeed in the extended time frame.
• If the project sponsor cannot demonstrate that the project can be delivered with the additional time extension, then SANDAG staff shall recommend a fund reallocation to the Transportation Committee in accordance with Section 5 below.

4. Extensions Beyond One Year

Requests totaling more than one year will be considered only for those projects showing extenuating conditions out of the control of the project sponsor, defined as follows:

• **Environmental**: During the environmental review process, the project sponsor discovers heretofore unknown sites (e.g., archeological, endangered species) that require additional investigation and mitigation efforts. The project sponsor must demonstrate that the discovery is new and unforeseen;

• **Permitting**: Difficulty in obtaining permits from various agencies. The project sponsor must demonstrate that every effort has been made to obtain the necessary permits and that the delay is wholly due to the permitting agency;

• **Construction Schedule**: Applies to projects restricted to certain construction dates during the year (i.e., to avoid nesting season for certain species); and

• **Other**: Changes in federal/state policies or laws.

The project sponsor shall appeal directly to the Transportation Committee providing a detailed justification for the requested extension including a revised project schedule. The Transportation Committee shall grant the additional extension only by a vote of two-thirds majority of eligible voting members in attendance.

5. AB 1012 Use-It-or-Lose-It Requirements/Fund Reallocation

Each year, Caltrans distributes a memorandum that indicates the amount of TE funds each region must obligate or risk losing the funds. Based on the schedules submitted for each of the funded projects, staff monitors the TE program’s obligation commitments for the San Diego region. This policy seeks to ensure project delivery to both meet the State requirements and promote quality projects in the region.

Any reallocation decision should be made with consideration given to the overall TE program’s obligation commitment. In the event the project funds are reallocated, staff will recommend to the Transportation Committee to either move the funds to the existing TE reserve account (for TE projects experiencing cost increases) or to notify the next project applicant on the ranking list of the amount of funds available, and request a project schedule and related budget information. If a new project cannot be delivered on a schedule that would avoid a loss of funds to the region, then the funding will be offered to the next project on the priority list. This process will be repeated until a satisfactory project is found.
I. Project Screening Criteria

Project screening criteria are meant to ensure the applicant is committed to the project, that the community supports it, and that it can be constructed within the schedule proposed. These criteria must be met in order for the project to be evaluated further.

A. Local Commitment/Authorization
The application must include a resolution or minute order from City Council, County Board of Supervisors, or Board of Directors authorizing the application, and committing to allocate the staff resources and matching funds necessary to complete the project as proposed.

B. Funding Commitment
The applicant must certify that funding for related improvements are in place to ensure the proposed project can be completed within the schedule proposed in the project application.

C. Funding Eligibility
The project must be eligible under the federal funding program guidelines.

II. Project Evaluation Criteria

Project evaluation criteria are used to score and rank projects. These criteria are based on the requirements of the funding source, and the goals of the Smart Growth Incentive Program.

Max. Points Weight Max. Score

A. Project Readiness

To encourage projects in smart growth development areas, and to evaluate how well they support smart growth development, the proposed projects are scored based on the intensity of development, the diversity of land uses, the quality of urban design in the project area, the provision of additional housing in general and affordable housing in particular.

Level of Project Development (Projects receive 1 point for each completed phase to a maximum of 5 points.)

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Weight</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feasibility Study</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>Preliminary Engineering</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Environmental Clearance</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Right-of-way Acquisition</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Final Design</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

B. Smart Growth Area Land Use Characteristics

Intensity of Development (0-5 points)

To what extent does the existing or planned project area meet the residential density levels identified in the RCP for its smart growth area type? Project areas at the minimum dwelling units per acre receive 1 point, and areas at the recommended upper end of the range receive 5 points.

Land use and Transportation Characteristics of Project Area (0-5 points)

How well does the existing or planned urban form in the project area meet the smart growth objectives of the RCP? Maximum points are given for areas that have, or are planned to have, a mix of residential and commercial uses appropriate to its smart growth area type, and have the appropriate transportation system characteristics.

Urban Design Characteristics of Project Area (0-5 points)

How well does the existing or planned urban design in the project area conform to the smart growth design principles in the RCP? Maximum points are given for areas where the existing built environment, or the design standards for new construction provides a human-scale built environment. The street network and trail system should provide direct access to commercial and civic services, recreational opportunities, and transportation services. Building construction should be oriented to the pedestrian. Street design should fully accommodate bicyclists and pedestrians, including transit passengers.

Related Land Development Projects (0-5 points)

Is there a current land development project associated with the proposed capital improvements? How well does it contribute to smart growth development by providing additional housing in the area?

Affordable Housing

Does the project serve affordable (subsidized) housing? How much additional affordable housing is provided?

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max. Points</th>
<th>Weight</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>2</td>
<td>5</td>
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<tr>
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<td>2</td>
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</tr>
<tr>
<td>4</td>
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<td>1</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
</tbody>
</table>
C. Quality of Proposed Project.

These criteria rate the proposed project based on the variety and quality of features proposed to be constructed. Points are accumulated for each type of improvement included in the project based on the quality of that improvement.

<table>
<thead>
<tr>
<th>Improvement Type</th>
<th>Description</th>
<th>Max. Points</th>
<th>Weight</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Pedestrian Access Improvements (0-5 points)</td>
<td>To what extent does the project improve pedestrian access to a regional transit station, transit corridor, or rural village center? Maximum points should be awarded to projects that connect people to activity centers (especially transit) following the design principles in SANDAG’s Planning and Designing for Pedestrians.</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>2 Bicycle Access Improvements (0-5 points)</td>
<td>To what extent does the project improve bicycle access to, and secure parking at a regional transit station, transit corridor, or rural village center? Maximum points should be awarded to projects that provide seamless bicycle access to the areas activity centers, and include secure bicycle parking.</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>3 Transit Facility Improvements (0-5 points)</td>
<td>To what extent does the project improve the transit patron environment at transit stations, along transit corridors, or at access points immediately adjacent to the transit facility?</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>4 Streetscape Enhancements (0-5 points)</td>
<td>How well does the project include public art elements, public seating, pedestrian-scale lighting, enhanced paving or wayfinding signage?</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>5 Traffic Calming Features (0-5 points)</td>
<td>How well does the project include one or more of the traffic calming devices recommended in Planning and Designing for Pedestrians?</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>6 Parking Improvements (0-5 points)</td>
<td>How well does the project provide appropriate levels of auto access to regional transit and the related project area without detracting from the quality of public spaces, and without detracting from transit, bicycle and pedestrian circulation?</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

D. Matching Funds

Matching Funds (0-15) | The higher the percentage of matching funds, the greater the number of bonus points the project will receive. | 15 |

TOTAL PROJECT SCORE 130

Notes

1 Affordable housing is defined as income- or price-controlled housing. See the program guidelines for details.
2 All bicycle facility improvements must comply with the requirements of the California Highway Design Manual, Chapter 1000.
March 10, 2005

TO: Regional Planning Technical Working Group

FROM: Carolina Gregor, SANDAG Staff

SUBJECT: Preliminary Draft Smart Growth Concept Map and Assumptions for Generic Overlays for Potential Smart Growth Areas

ACTION: DISCUSSION

Introduction

The Regional Comprehensive Plan (RCP) contains policy objectives and actions aimed at improving transportation and land use coordination. One of the RCP’s early actions is the development of a Smart Growth Concept Map illustrating the location of existing, planned, and potential smart growth areas. The Smart Growth Concept Map will be used in the update of the 2030 Regional Transportation Plan (RTP) and to determine eligibility to participate in the longer-term smart growth incentive program funded by TransNet.

Recommendation

The Technical Working Group (TWG) should review and discuss the Preliminary Draft Smart Growth Concept Map, and the draft recommended assumptions for the generic overlays for the potential smart growth areas. The Preliminary Draft Map will be available at the meeting; the draft assumptions are attached.

Background

Preliminary Draft Smart Growth Concept Map

In January, the TWG reviewed and recommended a proposed approach and associated timeline for developing the Concept Map. The approach was subsequently supported by the Regional Planning Committee and accepted by the SANDAG Board of Directors.

During February and March, staff and consultants from SANDAG met with representatives of local jurisdictions, Caltrans, and the North San County Transit Development Board (NCTD) to begin identifying candidate sites for existing, planned, and potential smart growth areas throughout the region. A preliminary draft map identifying candidate areas based on information gathered at the recent meetings will be presented at the March 10, 2005 TWG meeting.

The preliminary draft map serves as a starting point for local jurisdictions to review the locations and designations of candidate sites, and ensure that SANDAG staff has characterized and represented the sites accurately on the map. Staff will continue to work
with the planning staffs of local jurisdictions, Caltrans, and the transit agencies to further
refine the preliminary map before the map is presented to the Cities/County Transportation
Advisory Committee (CTAC), the Regional Planning Stakeholders Working Group, the
Regional Planning and Transportation Committees, and the SANDAG Board of Directors for
additional input. Attachment 1 provides a schedule of milestones.

Generic Overlays for Potential Smart Growth Areas

In addition to preparing the preliminary draft Concept Map, staff has developed a draft set
of land use assumptions, or “generic overlays,” for each potential smart growth area place
type. Potential smart growth areas are defined as opportunity areas where there is potential
for the application of urban design characteristics and minimum residential and
employment land use intensities described in the Smart Growth Matrix if appropriate
changes are made to local plans.

The potential smart growth areas will be included in the Enhanced Smart Growth Land Use
Scenario for transportation modeling purposes for the 2007 RTP update. The generic
overlays will serve as “placeholders” for transportation modeling purposes until the
potential areas "matriculate" into planned smart growth areas.¹

Attachment 2 includes recommended residential and employment intensity assumptions for
the generic overlays. The recommended assumptions are based upon a combination of:
(1) the midpoint of the intensity ranges specified in the RCP Smart Growth Matrix, and
(2) a sampling of projected land use intensities within certain existing smart growth areas.
Additionally, the generic overlays assume a particular mix of residential, employment, and
commercial land uses, depending upon place type. The TWG’s comments on the
recommended assumptions are requested.

Summary

Comments by the TWG on the Preliminary Draft Smart Growth Concept Map and the draft
recommended assumptions for the generic overlays for the potential smart growth areas
will assist in refining these two work products. The TWG will have several opportunities to
make revisions and review additional input provided by other groups at their upcoming
meetings, as described in Attachment 1.

¹ In cases where initial plans are under development for potential smart growth areas, local planning
staffs can develop “specific overlays,” with specific assumptions to be used for those areas.
Smart Growth Concept Map Timeline

The TWG will serve as the lead advisory group in preparing the Smart Growth Concept Map. Input and direction also will be solicited from the Regional Planning and Transportation Committees, the newly-constituted Regional Planning Stakeholders Working Group, the Cities/County Transportation Advisory Committee (CTAC), the SANDAG Board of Directors, and the public.

In order to allow sufficient time to develop the Enhanced Smart Growth Land Use Scenario for the RTP, a final Smart Growth Concept Map is needed by September 2005. The following steps are anticipated within this timeframe:

- TWG reviews Preliminary Draft Concept Map March 10, 2005
- SANDAG staff refines map, as necessary, based on TWG input March - April
- CTAC reviews Draft Concept Map including TWG changes April 7, 2005
- TWG reviews revised Draft Concept Map April 14, 2005
- SWG reviews Draft Concept Map April 19, 2005
- Regional Planning and Transportation Committees review Draft Concept Map May 6, 2005
- TWG and SWG review any revisions to Concept Map May 12 and 17, 2005
- Regional Planning Committee recommends Draft Concept Map to SANDAG Board June 3, 2005
- SANDAG Board accepts Draft Concept Map for public review June 24, 2005
- Public Review Period July – August 2005
- SANDAG Board accepts final Smart Growth Concept Map for use in preparing land use alternatives for the RTP update September 23, 2005
<table>
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<tr>
<th>Place Type</th>
<th>Residential Density (1)</th>
<th>Employment Intensity (2)</th>
<th>Mixed Use Intensity (3)</th>
<th>Frequency of Transit Service</th>
<th>Residential Density</th>
<th>Employment Intensity</th>
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<td>50+</td>
<td>25+</td>
<td>High to very high (less than 15 minute peak) on all corridor/regional services. High frequency throughout the day on all lines.</td>
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<td>Very high service (less than 15 minute) throughout the day on all corridor/regional service or connecting shuttle. High frequency throughout the day on most lines.</td>
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<td>Served by one or more local services with moderate frequencies throughout the day. Possible peak period corridor/regional service with transit stations located within village core.</td>
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**Notes:**

1. Residential Density: Total dwelling units divided by built or planned residential acreage net of public right-of-way within 1/4 mile of transit station. (No requirement to be within 1/4 mile of transit for Rural Community.)
2. Employment Intensity: Total employees divided by built or planned office, commercial, retail acreage net of public right-of-way within 1/4 mile of transit station. (No requirement to be within 1/4 mile of transit station for Rural Community.)
3. Mixed Use Density: 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.) within 1/4 mile of transit station.

* Figure is the mid point of the density/intensity range found in the Smart Growth Matrix of the Regional Comprehensive Plan. The figures have been rounded down to the closest multiple of 5 where appropriate.

** Figure is identical to the minimum threshold found in the Smart Growth Matrix of the Regional Comprehensive Plan. An 'n/a' indicates that a density/intensity target was not identified in the RCP Smart Growth Matrix.
March 10, 2005

TO: Regional Planning Technical Working Group

FROM: SANDAG Staff

SUBJECT: Work Program for the Regional Transportation Plan (RTP) Update

ACTION: DISCUSSION

Background

SANDAG staff has prepared a draft work program and schedule for updating the Regional Transportation Plan, MOBILITY 2030. The last update was in March 2003, and the next regularly scheduled update would occur in March 2006. Existing federal legislation requires SANDAG to make an air quality conformity determination of the long-range transportation plan every three years.

However, pending language in the federal transportation reauthorization legislation would change the normal update cycle to at least four years. In addition, with an extended four-year cycle, staff proposes to develop a more comprehensive update of the RTP in 2007, incorporating a new regional growth forecast, Regional Comprehensive Plan (RCP) strategic initiatives, the results of the Independent Transit Planning Review, and the funding impact of the TransNet extension. As a result, staff has developed a work program to produce both a technical RTP update in 2006 and a comprehensive RTP update in 2007.

Discussion

Staff will provide an overview of the preliminary elements and schedules for the concurrent RTP updates. It is possible that if the federal transportation legislation is reauthorized in the near future, the need for a 2006 RTP update could be eliminated. In that case, staff would focus its efforts on the issues and products necessary for the comprehensive 2007 RTP update. The TWG should provide comments on the RTP work program, which will be presented to the Regional Planning Committee and Regional Transportation Committee at a joint meeting on Friday, April 1, 2005.

Included with this item are five attachments. The first two are the basic 2006 and 2007 RTP Schedules. Attachment 3, 2007 – Issue Papers, provides more detail about the envisioned schedule for the various special analyses that would feed into the 2007 RTP. These issues will be brought to the Regional Planning Technical and Stakeholders Working Groups as they are developed over the course of the next year. Attachment 4 is the preliminary RTP Work Program, which includes major tasks and initial thoughts on the content of the issue papers. Finally, Attachment 5, 2006 and 2007 RTP Milestones, depicts the dates when milestone products or issues would come before the various working groups, Policy Advisory Committees, and the Board of Directors for final review or action.

MHH

Attachments
## 2006 Regional Transportation Plan Schedule

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<th>2006</th>
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2005 Draft 03/04/2005
### MAJOR TASKS

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(See detailed breakout)
### 2007 RTP - Issue Papers

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Timing and Content To Be Determined

*Draft 03/04/2005*
RTP Work Program – 2006 and 2007 Updates

1. Establish Work Program (March 2005)
   - 2006 RTP based on federal 3-year cycle and includes only updated funding scenarios based on revised revenue projections and project cost estimates; 2007 RTP intended to be comprehensive and incorporate better land use and transportation coordination, as outlined in the RCP.
   - Establish RTP staff team with department reps and set up regular meetings.
   - Review work program with Executive Team March 1; SWG, RPTWG, CTAC (March 2005).
   - Take to the Transportation Committee/Regional Planning Committee (April 1, 2005).

   - Incorporate RCP directives and Strategic Initiatives.
   - Incorporate Caltrans RTP Supplement guidelines.
   - Provide direction from the Board for 2007 RTP (June 2005).
   - Information back to SWG, RPTWG, CTAC (July 2005).

   These either special or summary reports will be reviewed by the SWG, RPTWG, CTAC, with policy direction from the Transportation and Regional Planning Committees

SYSTEM DEVELOPMENT ISSUE PAPERS
   - Revise the Transportation Project Evaluation Criteria for the 2007 RTP (March 2005 - April 2006). This task should create criteria both for prioritizing regional corridors, and for ranking individual projects. Include prioritized Rail Grade Separation projects (October 2005). Determine how to include intermodal projects from the regional freight strategy. Discuss with the SWG, RPTWG, and CTAC, possibly with a temporary subcommittee. Finalize criteria with policy
direction from TC, RPC, and Board (April 2006). Use the criteria to develop the networks for the 2007 RTP funding scenarios.

- **Goods Movement Issues** - To be completed under OWP element 30009. Work with rail, truck and air infrastructure providers and users to develop a long-range and integrated freight strategy for the region. The individual modal assessment will be completed for the 2006 RTP Update (June 2005). The intermodal strategy will be completed for the 2007 RTP (March 2006).

- **Update Regional Arterial System (Potential)** - Does the regional arterial network need to be reviewed and updated for the 2007 RTP? Should this be done given the future TransNet development fee for regional facilities? (March 2006).

**LAND USE TRANSPORTATION CONNECTION ISSUE PAPERS**

- **Create a Smart Growth Land Concept Map** (September 2005). Preliminary SG Concept Map by June 2005 and a Final SG Concept Map by September 2005, providing time to create a land use alternative for 2007 RTP input.

- **Cross-Border Transportation Movements** - Given increasing development across the border in Baja California, assess the transportation impacts of cross-border travel. Include the impacts of the new East Otay Mesa POE on the location of planned BRT routes and commercial inspection facilities.

- **Interregional Movements** - A study of increased job opportunities in Riverside County is now underway. If the recommendations of the IRP Phase II Employment Clusters were implemented, how would it change interregional travel demand and what would be the resulting capacity and service needs on the regional transportation system? Concurrently, Caltrans is conducting an analysis of the I-15 corridor capacity needs at the Riverside County line and coordinating planning for that facility between the two Caltrans districts. A related issue is the growing stock of housing in Imperial County and the travel to and from the San Diego region. What impacts does this recent trend have on the regional transportation system? (September 2005 - March 2006).

- **Habitat planning** - The new TransNet-funded Environmental Resource Planning and Coordination is intended to improve the preservation of habitat areas associated with regional transportation projects. How will the new program be implemented and what is its effect on the 2007 RTP? (June 2006).

- **Tribal Reservation Development Impacts** - New tourist-oriented development on the reservations has caused impacts in areas where the existing and planned infrastructure did not anticipate it. How can the region better assess the
potential impacts on regional facilities from reservation development and provide the transportation facilities to avoid related congestion? (July 2005 - December 2005) Assess the existing and planned land uses on tribal lands (July – September) and the network impacts (October – December 2005).

DEMAND MANAGEMENT ISSUE PAPER

• Energy Impacts to Transportation – What types of TDM strategies can affect the energy demands of the region for transportation of people and goods? As the cost of energy goes up, how can the region reduce its demand for transportation-related energy and the resulting pollutants? Can transportation corridors also serve as energy/utility corridors? (January – June 2006).

SYSTEMS MANAGEMENT ISSUE PAPER

• Public Safety and Security – (To be developed) It will include any impacts of Homeland Security issues on the regional transportation system, as well as improved safety on the highways and transit system.

4. Public Outreach and Involvement – Communications staff

• Subregional workshops for the 2006 and 2007 RTP.
• Mini-grants for outreach to minority/low income groups.
• Work with communications staff to schedule events and outreach products; bring results to TC/RPC.

5. Update Revenue and Project Cost Projections, with improved operating forecasts

• Incorporate improved operating costs in the projections, as directed by Federal Highways and Federal Transit Administration.
• For 2006 RTP, select new base year to be used for both the 2006 and 2007 RTPs. Update project costs and revenue forecasts for the Revenue Constrained and Reasonably Expected funding scenarios, incorporating the TransNet extension (May 2005).
• For 2007 RTP, review project costs and revenue forecasts for the Revenue Constrained and Reasonably Expected funding scenarios, incorporating TransNet II and TEA-III, if new legislation is passed (June 2006).
6. Incorporate recommendations from Corridor/Subarea Studies /Deficiency Plans for 2007 RTP (June 2006). These studies could possibly be summarized as an issue paper(s) and brought to the Working Groups for review

- I-805 Corridor and DAR study; I-5 North Coast; Central I-5 HOV analysis; North South Transportation Corridor Analysis; Others?


- Create Capacity File for Existing Policies (July 2005).
- Use SG Land Use Concept Map from September 2005 to generate an alternative for 2007 RTP analysis (March 2006).
- Internal Review of Existing Policies (March 2006).
- Board Accept Land Use Plan (April 2006).

8. Update Performance Indicators

- The performance indicators used to measure the success of transit and highway networks should be reevaluate and updated to be consistent with the goals and policy objectives of the Board (February 2006).
- Update base year and projected Levels of Service, travel time, speed and other indicator data for the 2007 RTP (March – August 2006).

9. Develop Network and/or Land Use Alternatives

- 2006 RTP – Develop EIR alternatives to include SOFAR agreement (March – June 2005).
- 2007 RTP – Land Use and network alternatives need to be developed by March 2006.

10. Analyze Alternatives and Select Preferred Unconstrained Network for 2007 RTP (March – June 2006)

- Perform travel forecasts.
- Apply updated performance measures, such as overall LOS and average corridor travel times, to provide a grid of overall effectiveness of each alternative.
- Select Preferred Network; review with WGs, Committees and gain Board approval (June 2006).
11. Update Network Phasing
   - Create new Revenue Constrained and Reasonably Expected funding scenarios.
   - Employ revised evaluation criteria to assist in project selection for 2007 RTP scenarios.
   - Review with WGs and gain approval from TC and Board.

12. Perform AQ forecasts
   - FTA/FHWA require better documentation on SOV alternatives for AQ analysis.
   - Follows the selection of the Revenue Constrained scenario of the preferred network alternative.
   - AQ for 2006 RTP provided along with draft EIR (Nov 2005); revisions for final RTP (March 2006).
   - AQ for 2007 RTP provided along with draft EIR (Nov 2006); revisions for final RTP (March 2007).

13. Produce Draft RTP
   - Preliminary drafts sent to Transportation Committee in August.
   - RTP 2006; include updated base-year data as available (October 2005).
   - RTP 2007 (October 2006).

14. EIR Preparation
   - EIR for RTP 2006 incorporating agreed-upon SOFAR alternative; draft EIR (Nov 2005); final (March 2006).
   - Updated EIR for RTP 2007, draft EIR (Nov 2006); final (March 2007).

15. Revised Draft Final RTP
   - RTP 2006 (February 2006).
   - RTP 2007 (February 2007).

16. Final RTP/EIR Adoption
   - RTP 2006 (March 2006).
   - RTP 2007 (March 2007).

17. Air Quality Conformity
# 2006 and 2007 RTP Milestones

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