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, April 14, 2005
1:15 p.m. - 3:15 p.m.
SANDAG, 8th Floor, Conference Room 8A*
401 B Street, Suite 800
San Diego, CA 92101-4231

Committee Vice-Chair: Niall Fritz, City of Poway
(858) 668-4601
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Staff Contact: Susan Baldwin
(619) 699-1943
sba@sandag.org

* Please note the change in meeting location

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# REGIONAL PLANNING TECHNICAL WORKING GROUP

April 14, 2005

The Regional Planning Technical Working Group may take action on any item appearing on this agenda.
Staff Contact: Susan Baldwin, (619) 699-1943, sba@sandag.org

<table>
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<th>ITEM #</th>
<th>RECOMMENDATION</th>
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<tr>
<td>1.</td>
<td>WELCOME AND INTRODUCTIONS (Vice-Chair Niall Fritz, City of Poway)</td>
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<td>2.</td>
<td>PUBLIC COMMENTS AND COMMUNICATIONS</td>
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<td>Members of the public will have the opportunity to address the Technical Working Group on any issue within the jurisdiction of the Working Group. Speakers are limited to three minutes each.</td>
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<td>3.</td>
<td>CONSENT ITEM</td>
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<td>The Technical Working Group will take action on all items on the consent agenda without further discussion and with one vote unless an item is pulled by a Working Group member of the public.</td>
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<td>4.</td>
<td>APPROVE SUMMARY OF THE MARCH 10, 2005 TECHNICAL WORKING GROUP MEETING</td>
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<td>The TWG should review and approve the March 10, 2005 meeting summary.</td>
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<td>5.</td>
<td>DISCUSSION REPORTS</td>
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<td>6.</td>
<td>RECOMMEND PILOT SMART GROWTH INCENTIVE PROGRAM (Stephan Vance)</td>
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<td>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.</td>
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<td>7.</td>
<td>DISCUSSION WORK PROGRAM FOR THE REGIONAL TRANSPORTATION PLAN (RTP) UPDATE (Mike Hix)</td>
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<td>SANDAG staff will provide an overview of the work program and schedule for updating the RTP. A 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. (This item was carried over from the March 10 agenda.)</td>
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6. SMART GROWTH CONCEPT MAP: GENERIC OVERLAY ASSUMPTIONS AND PUBLIC OUTREACH WORKSHOPS (Carolina Gregor and Paul Kavanaugh)

Due to the volume of additional smart growth areas identified since the last meeting and related technical issues that need discussion, a revised draft Smart Growth Concept Map will be available at the May TWG meeting. The attached report presents questions that the TWG should discuss in relation to the Smart Growth Concept Map.

7. UPDATE ON TRANSNET Environmental Mitigation Program (Bob Leiter)

SANDAG staff will update the TWG regarding the TransNet Environmental Mitigation Program.

8. ADJOURNMENT AND NEXT MEETING

The next TWG meeting will be held on Thursday, May 12, 2005 from 1:15 - 3:15 p.m.

+ next to an agenda item indicates an attachment
Highway traffic noise is an important issue for communities across America. If not properly addressed, highway noise can disrupt our daily routines. Local planners, developers, and residents spend countless hours considering methods to address existing or anticipated noise from nearby roadways. The Federal Highway Administration (FHWA) wants developers, government officials, planners, and private citizens to know that the best way to reduce highway traffic noise is usually by advance planning and shared responsibility. Local government and developers working cooperatively with Federal and State governments can plan, design, and construct new development projects and new roadways so that traffic noise is reduced through noise compatible land use planning. If your organization wants to learn more about noise compatible land use planning in your community and across the nation, register to attend the free FHWA Noise Compatibility & Land Use Workshop on April 26, 2005, from 1-4 p.m. in the Boardroom at the San Diego Association of Governments (SANDAG) – 401 B Street, Suite 800, San Diego California 92101. Simply print this form, complete and detach the bottom portion, and fax it to Gwen Goodwin at 713-313-1923. Space is limited, so fax your registration form by April 21st to ensure a seat.

Yes, I will attend the workshop. No, I cannot attend but want more information.

Name:

Company/organization’s name:

Address:

Phone: Fax:

Email:

For more information contact: Gwen Goodwin with Texas Southern University at 713-313-7283. You may also email her at goodwingc@tsu.edu.

This meeting is sponsored by Federal Highway Administration (FHWA), California Department of Transportation (CALTRANS), San Diego Association of Governments (SANDAG) & Texas Southern University (TSU).
April 14, 2005

TO: Regional Planning Technical Working Group (TWG)

FROM: SANDAG Staff

SUBJECT: Summary of the March 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**

No public comments or communications.

**CONSENT ITEMS (2-3)**

**Agenda Item #2: Summary of the February 10, 2005 Regional Planning Technical Working Group Meeting**

**Agenda Item #3: 2004 Congestion Management Program (CMP) Update**

A motion and second were made to approve the consent calendar. The motion passed unanimously.

**REPORTS (3-10)**

**Agenda Item #3: Recognition of Joan Vokac, County of San Diego**

Joan Vokac, County of San Diego, is retiring after 30 years of public service. Gail Goldberg, City of San Diego, thanked Ms. Vokac for her participation in many planning activities at SANDAG and presented her with a certificate of recognition on behalf of the TWG.

**Agenda Item #4: Showcasing Smart Growth: Smart Growth in Solana Beach**

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, the mixed use project currently proposed at the North San Diego County Transit Development Board (NCTD) COASTER station in Solana Beach was presented to the TWG by Greg Shannon of Shedonna, LLC and Jim Cunningham of NCTD.

Mr. Cunningham reported that NCTD originally purchased the parcels that make up the mixed use project in the early 1990s for the COASTER station. In the late 1990s NCTD also conducted a grade-
separation project at Lomas Santa Fe Drive. In 2000 the City of Solana Beach partnered with NCTD to form an ad hoc committee to discuss the possibility of a development at the Solana Beach COASTER station. The station is located along South Cedros Avenue near the corner of Lomas Santa Fe Drive and opposite the Highway 101 corridor. The ad hoc committee developed the following goals for station development:

- Provide long-term parking solutions
- Support rail transit
- Generate a long-term revenue stream
- Develop a transit- and community-friendly project
- Adhere to the Regional Growth Management Strategy’s Land Use Distribution Element principles
- Complement the existing commercial district
- Consider the concerns of the residential community
- Facilitate traffic circulation
- Consider the accepted conceptual plan on a good faith basis

The station’s current surface parking will be replaced by the proposed mixed use development, causing NCTD to accommodate current and future parking needs by constructing an underground parking structure. Providing the underground parking garage is considered key to the project’s success.

Mr. Shannon expressed his support for smart growth and transit oriented development, and offered some criticisms of SANDAG’s Pilot Smart Growth Incentive Program. He noted that the program criteria will not award funding to smart growth projects because there is no incentive given to projects that put parking below grade—a principle he feels is needed for successful implementation of smart growth projects with the necessary high densities and intensities of uses. Incentives for below grade parking would help developers provide this crucial and most expensive component of smart growth development.

The original land use plan for the station area was developed with community input in the early 1990s. Mr. Shannon was able to convince the community to support the following changes to that plan in favor of smart growth development:

- The elimination of all 122,655 square feet of above grade parking by moving it underground.
- An increase in residential units from 79 to 141, including 14 units restricted to very low income renters. The project features 2.5 acres of residential land at a density of 51.2 units per acre. The 141 units are all rentals.
- Removal of the proposed vehicle bridge linking Highway 101 with the above grade parking garage.
- An increase in revenue producing square footage from 138,800 to 180,912 while decreasing the total amount of above grade square footage—making for more efficient use of the land.
- A 27 percent reduction in Total Average Daily Trip Generation compared with the project’s original land use plan.
The project also features:

- Live/work lofts and office over ground floor retail;
- A public plaza at North Cedros Avenue and Lomas Santa Fe Drive;
- The North Coast Repertory Theatre;
- Architecture and design complementary with existing adjacent uses and evocative of Solana Beach history; and
- A pedestrian bridge providing beach access.

The project’s summary characteristics include:

- Total Site: 9.63 acres
- Railroad and Bus Operations: 4.91 acres
- Developable Area: 4.72 acres
- Residential Area: 2.50 acres
- Residential Density: 51.20 units/acre
- Commercial Area: 2.22 acres
- Commercial FAR: 0.77

Construction of the underground parking garage will begin in April of 2006 with completion anticipated in June 2007. The Cedros Crossing and Lofts will be completed in February 2009. The total project will cost approximately $48 million.

Mr. Shannon stated the following public benefits of the project:

- Transit Parking
- Affordable Housing
- Traffic Reduction
- Beach Sand Replenishment
- Public Art – North Coast Repertory Theatre
- Transit Oriented Development
- Reduced Traffic Generation
- Pedestrian Orientation for Beach Access
- In summary, SMART GROWTH

Mr. Shannon commented that the creation of interesting, vibrant pedestrian-oriented public places was one of the project’s major goals, and crucial to the success of smart growth and transit-oriented development projects. He added that the proposed mixed use development for the Solana Beach COASTER station demonstrates that projects with high density and intensity development can overcome NIMBYism and gain community acceptance when properly designed.

The following questions were asked upon completion of Mr. Shannon’s presentation:

Patrick Murphy, City of Encinitas, asked if the commercial uses will have joint use of the residential parking garage. Mr. Shannon replied that the residential garage will not share spaces with commercial uses in an effort to keep down the total number of spaces, but that commercial and office uses will share spaces.
Ed Kleeman, City of Coronado, asked if the ground floor commercial space of live/work lofts is connected to the upstairs residential units. Mr. Shannon responded that the live/work lofts feature a common entrance.

Dennis Turner, City of Carlsbad, asked if tenants are required to live in the residential component of the live/work lofts. Mr. Shannon replied that tenants are not required to live in such units. Mr. Shannon expects that various professional services will be situated in the live/work lofts because Solana Beach has a high proportion of residents who work from home.

In response to a question from Carolina Gregor, SANDAG staff, Mr. Shannon clarified that the 14 very low income units will be dispersed through the proposed project and indistinguishable from the market rate units.

In response to a question from Bill Liebermann, a SANDAG consultant, Mr. Shannon explained that the project will have pay-parking if adequate grant funding is not obtained. The cost would be about $4 for a 24-hour period, with COASTER riders exempt.

Chair Goldberg, City of San Diego, complemented Mr. Shannon for his ability to work with community members.

Agenda Item #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, asked the TWG to appoint a representative to the Demographic and Economic Forecasting Model (DEFM) Technical Working Group. The DEFM Working Group will function in an advisory capacity to assist SANDAG staff in the update of the 2030 Regional Growth Forecast. Dennis Turner, City of Carlsbad, who represented the TWG on the previous Working Group, was asked to serve again; Mr. Turner agreed.

Agenda Item #6: SANDAG Board Action on the Final Regional Housing Needs Assessment (RHNA)

Susan Baldwin, SANDAG staff, reported that the SANDAG Board approved the final Regional Housing Needs Assessment (RHNA) for the 2005-2010 housing element cycle. The Board approved the income allocations of Modified Alternative 1 in conjunction with 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.

Ms. Baldwin asked the TWG to discuss two items related to the RHNA: (1) The implementation of the memorandum associated with the adoption of the Final RHNA and (2) convening an ad hoc working group of TWG, Regional Planning Stakeholders Working Group, and Regional Housing Task Force members to identify ways in which the RHNA process can be improved before the start of the next housing element cycle in July 2008. The TWG should appoint members interested in serving on the ad hoc working group.
The following provisions of the memo adopted in combination with Modified Alternative 1 were explained:

1. Jurisdictions whose 1999 lower income households as a percentage of total households is estimated to be greater than the regional average shall receive 15 bonus points (out of 100 possible) for projects requesting funding through the Pilot Smart Growth Incentive Program.

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 the 2005-2010 cycle), the following criteria shall apply:
   
   a. In order to qualify for such funding, a jurisdiction will be required to demonstrate compliance with provisions of their adopted housing element which set forth their commitment to providing adequate multifamily 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 which lower income housing units are being produced in accordance with the housing unit figures contained in RHNA Alternative 3.

   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.

Ms. Baldwin explained that projects requesting funding through the current criteria of the Pilot Smart Growth Incentive Program are awarded points if price- and income-controlled (affordable) housing is provided. It has not yet been determined if provision #1 will replace or be added to the existing affordable housing criterion.

TWG members had the following questions and comments about the memo provisions and convening an ad hoc committee to discuss improvements to the RHNA process for the next housing element cycle:

Dennis Turner, City of Carlsbad, stressed the importance of understanding the memo provisions and commented that their interpretation should be added to the proposed ad hoc committee’s tasks. Ms. Baldwin replied that memo interpretation could be added to the ad hoc committee’s intended task of discussing improvements to the RHNA process.

Barbara Redlitz, City of Escondido, agreed with the importance of understanding the memo, but felt the issues of RHNA process reform and memo interpretation should be discussed separately.

Bob Leiter, SANDAG, suggested that the ad hoc committee resolve outstanding issues with the memo provisions before discussing improvements to the RHNA process.
Patrick Murphy, City of Encinitas, asked if jurisdictions unable to secure the 15 bonus points outlined in provision 1 will be essentially disqualified from the pilot incentive program. Staff responded that that issue remains unresolved.

Patricia Rutledge, City of La Mesa, commented that the manner in which jurisdictions verify compliance with their housing elements under provision 2c should be uniform.

In response to a question from Mark Brunette, City of Santee, Ms. Baldwin affirmed that under provision 2a jurisdictions are not eligible to compete for discretionary funding until their housing element is certified. Kim Kawada of SANDAG added that jurisdictions have until April 1, 2006 to obtain housing element certification if they are to compete for the Transportation Development Act (TDA) bicycle and pedestrian facility funds—the first funding source subject to provision 2a.

Mr. Brunette also questioned how actual production is defined in the memo—a matter that will be discussed by the ad hoc committee.

Upon conclusion of discussion four TWG members—Dennis Turner of Carlsbad, Mark Stephens of Chula Vista, Jerry Backoff of San Marcos, and Barbara Redlitz of Escondido—volunteered to serve on the ad hoc committee discussing the memo provisions and RHNA process reforms.

**Agenda Item #7: Pilot Smart Growth Incentive Program**

Discussion of the Pilot Smart Growth Incentive Program (SGIP) occurred after discussion of the Preliminary Draft Smart Growth Concept Map and Assumptions for Generic Overlays (Item #8) at the request of Chair Goldberg.

Stephan Vance, SANDAG, reported that much progress has been made in developing the Pilot Smart Growth Incentive Program: an ad hoc working group has been collaborating with SANDAG staff to develop project evaluation criteria for the Pilot SGIP; the project evaluation criteria have been amended to reflect input provided by the Regional Planning, Transportation, and Cities/County Transportation Advisory Committees, as well as the TWG; weighting factors have been developed for each evaluation criterion; draft program guidelines have been prepared; and the SGIP application form is currently being developed.

The SGIP was also recently modified to reflect the adopted final Regional Housing Needs Assessment (RHNA) for the 2005-2010 housing element cycle in which SANDAG staff was directed to alter SGIP project evaluation criteria to award bonus points related to affordable housing. Staff responded by increasing the points for the affordable housing criterion by 15 points, making the criterion 15 percent of 130 points possible.

TWG members had the following questions and comments:

Gail Goldberg, City of San Diego, noted that she would like to include both of the affordable housing criteria: the initial criteria related to projects that serve affordable housing and the amount of affordable housing provided as well as the bonus points for jurisdictions with a greater percentage of lower income households than the regional average associated with the RHNA memo approved by the SANDAG Board. Dennis Turner, City of Carlsbad, agreed.
Gail Goldberg also commented that because achieving high densities is the most difficult aspect of smart growth development the SGIP should strongly promote high density projects by increasing the point value of the “intensity of development” criterion. Currently, she felt too few points have been assigned to density.

Patrick Richardson, City of Vista, asked if a jurisdiction could be competitive without a project that is ready, i.e. can project readiness be trumped?

Bob Leiter suggested changing the project readiness weighting factor.

Kim Kawada, SANDAG, noted that this item is scheduled to be presented at a joint meeting of the Regional Planning Committee and Regional Transportation Committee on April 1, 2005.

Gail Goldberg suggested that this item be brought back to the TWG and be placed first on the agenda for the April 14 meeting.

After some discussion about the process and meeting schedule, Stephan Vance stated that the SGIP Ad Hoc Working Group would hold another meeting to discuss these issues, and Gail Goldberg, Ed Kleeman, Robert Larkins, and Barb Redlitz requested that they be involved in that meeting.

Barb Redlitz, City of Escondido, expressed concern that the housing criteria not be whittled away.

Gail Goldberg, City of San Diego, stated that it was clear to her that the Board's RHNA memo bonus points related to lower income households was in addition to the affordable housing criterion.

Barb Redlitz questioned the need for weighting factors, and SANDAG staff responded that the weighting helps with scoring and provides a common scale for each item.

**Agenda Item #8: Preliminary Draft Smart Growth Concept Map and Assumptions for Generic Overlays**

Discussion of the Preliminary Draft Smart Growth Concept Map and Assumptions for Generic Overlays occurred prior to discussion of the Pilot Smart Growth Incentive Program (Item #7) at the request of Chair Goldberg.

Development of a Smart Growth Concept Map illustrating the location of existing, planned, and potential smart growth areas is one of the initiatives put forth in the Regional Comprehensive Plan (RCP) to improve land use and transportation coordination. The map will be used to update the 2030 Regional Transportation Plan (RTP) and to determine eligibility in the longer-term TransNet smart growth incentive program. Carolina Gregor of SANDAG asked the TWG to review and provide input on both the Preliminary Draft Map and the draft assumptions for the generic overlays for the potential smart growth areas.

Ms. Gregor reported that the data illustrated on the map represented input collected at the meetings SANDAG staff held with each jurisdiction; TWG members should notify her of any errors. SANDAG staff is working with several jurisdictions to identify additional areas, and will hold additional meetings with interested jurisdictions.
Ms. Gregor requested that each jurisdiction provide one or two paragraph descriptions of the areas illustrated on the map to facilitate public and policy-maker understanding of what is intended for each smart growth opportunity area.

SANDAG previously provided the jurisdictions with detailed maps of their jurisdictions to help them identify smart growth opportunity areas. Bill Lieberman (a consultant working with SANDAG staff on development of the map) asked the TWG members if they like the detailed individual maps or would prefer subregional maps with relatively general information. Patrick Murphy, City of Encinitas, stated that he prefers the detailed maps for local use.

Ed Kleeman, City of Coronado, stressed the importance of illustrating developed smart growth areas on the Concept Map, and suggested production of an additional map for such a purpose. Bob Leiter, SANDAG staff, responded that the Concept Map is intended to illustrate existing smart growth areas. Mr. Leiter added that in areas like Coronado, meeting the land use criteria for an existing smart growth area designation requires being located along a regional transit corridor. Additionally, SANDAG is willing to use different terminology that clearly distinguishes existing smart growth areas from planned and potential areas if necessary.

In response to a question from Mark Brunette, City of Santee, Ms. Gregor responded that in order to allow SANDAG staff adequate time to update the Concept Map, jurisdictions should complete the identification of their smart growth opportunity areas within the next couple of weeks.

Ms. Gregor reported that in addition to the Preliminary Draft Concept Map, SANDAG staff has also developed generic overlays (a set of land use assumptions) for each potential smart growth area displayed on the Concept Map. The generic overlays are composed of residential and employment intensity assumptions and assume a particular mix of residential, employment, and commercial land uses. The intensities and land use mixtures are based on the midpoint of the intensity ranges specified in the RCP Smart Growth Matrix, and a sampling of projected land use intensities within certain existing smart growth areas. The generic overlays vary for each of the seven smart growth area place types.

The potential smart growth areas will be included in the Enhanced Smart Growth Land Use Scenario of the 2007 RTP update for transportation modeling purposes only; the adopted RTP will be based on adopted general plans. The generic overlays will serve as “information placeholders” for transportation modeling purposes until potential areas graduate to a “planned smart growth area” designation. In cases where initial plans are under development for potential smart growth areas, jurisdictions may provide specific overlays (specific land use assumptions) to be used in lieu of the generic overlays.

In response to a question from Dennis Turner, City of Carlsbad, Ms. Gregor and Bob Leiter of SANDAG clarified that the generic overlays will be used only for the development of the alternative land use scenarios during preparation of the 2007 RTP update; the preferred planning alternative for the RTP will reflect only adopted general plans.

Ed Kleeman, City of Coronado, suggested using two different sets of generic overlays—one for vacant land and the other for redevelopment/infill areas.
Agenda Item #9: Work Program for Regional Transportation Plan (RTP) Update

Due to a lack of time, the report on the work program for the Regional Transportation Plan (RTP) was postponed until the next TWG meeting.

Agenda Item #10: Update on League of California Cities Housing/General Plan Task Force

Due to a lack of time, the update on the League of California Cities Housing/General Plan Task Force was postponed until the next TWG meeting.

Agenda item #11: Adjournment and Next Meeting

The next meeting of the Regional Planning Technical Working Group will be held April 14, 2005 from 1:15 to 3:15 p.m. in the 7th Floor Conference Room.
April 14, 2005

TO: Regional Planning Technical Working Group

FROM: SANDAG Staff

SUBJECT: Draft Pilot Smart Growth Incentive Program Evaluation Criteria and Program Guidelines

ACTION: RECOMMEND

Introduction

At its March 10, 2005 meeting, the Regional Planning Technical Working Group (TWG) discussed the Pilot Smart Growth Incentive Program (SGIP). SANDAG staff presented the draft project evaluation criteria and program guidelines, and responded to questions and comments from TWG members. The TWG did not have time to fully discuss the Pilot SGIP at its March 10 meeting, and postponed action on the item to its April 14 meeting.

The TWG raised two substantive issues: (1) whether Criterion B1 (Intensity of Development) should receive a higher weight; and (2) concern that the mandated Low Income Household Bonus points for lower income households (Criterion E) might result in the selection of projects that are not “ready to go.” Discussion of these issues was referred back to the ad hoc working group that has been collaborating with SANDAG staff to develop the Pilot SGIP.

The ad hoc working group agreed that a higher weight factor should be applied to Criterion B1 (Intensity of Development). However, the group did not reach consensus on whether that factor should be increased from a weight factor of two (as originally proposed) to a weight factor of three or four. At their April 1 joint meeting, the Regional Planning and Transportation Committees took an advisory vote and recommended that the weight factor be increased from two to four, resulting in a maximum possible score of 20 for that criterion. This change in turn required an increase in the Low Income Household Bonus from 20 to 22 points to maintain its 15 percent share of the total points.

The ad hoc working group also discussed the potential effect of the Low Income Household Bonus points on the project selection process, and concluded that no single criterion would bias the evaluation process. Staff has refined the draft program guidelines to reflect the changes discussed above. The revised criteria and program guidelines are included as Attachment 1 to this report.

Recommendation

The TWG is asked to recommend approval of the revised evaluation criteria and program guidelines for implementing the Pilot SGIP to the Regional Planning and Transportation Committees. In turn, the Committees will be asked to recommend that the SANDAG Board approve the Pilot SGIP project evaluation criteria and program guidelines at its May 27, 2005 meeting.
Discussion

Revised Evaluation Criteria. There are two differences between the evaluation criteria matrix presented to the TWG at the March meeting and the attached matrix (pages 8 to 17 of Attachment 1). First, the matrix weighting factor for the Intensity of Development criterion has been changed from two to four, resulting in a maximum score of 20 points for that criterion. With that change, the weighting factors distribute the points between the various sections of the evaluation matrix as follows:

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<th>Category</th>
<th>Total Points</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>A. Project Readiness</td>
<td>15</td>
<td>10.2%</td>
</tr>
<tr>
<td>B. Smart Growth and Land Use Characteristics</td>
<td>55</td>
<td>37.4%</td>
</tr>
<tr>
<td>C. Quality of Proposed Project</td>
<td>40</td>
<td>27.2%</td>
</tr>
<tr>
<td>D. Matching Funds</td>
<td>15</td>
<td>10.2%</td>
</tr>
<tr>
<td>E. Low Income Household Bonus</td>
<td>22</td>
<td>15.0%</td>
</tr>
<tr>
<td>Total</td>
<td>147</td>
<td>100.0%</td>
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Because the total points available increases with this change, the second minor change to the evaluation criteria is that the Low Income Household Bonus Points must be raised from 20 to 22 in order to maintain its 15 percent share of the total score. As a result, the total points available in the evaluation matrix would be 147. These changes require adjustments to the program guidelines, which are discussed below.

The TWG also had raised a concern that the Low Income Household Bonus points might overly influence the selection process, potentially decreasing the pilot program's emphasis on “ready to go” projects. The ad hoc working group looked at this issue, but did not recommend any changes to the Project Readiness criterion (Criterion A). The percentage of points for project readiness did not change that significantly with the addition of the Low Income Household Bonus.

Program Guidelines. The draft program guidelines were developed to meet the federal and state requirements of the Transportation Enhancement (TE) funds that will be the funding source for the program. 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 guidelines also explain the application requirements and evaluation criteria, and describe the project selection process.

At their April 1 joint meeting, the Regional Planning and Transportation Committees also discussed the recommended $2 million per project limit, which was based on a survey of local jurisdiction staff. The Committees discussed whether a higher grant limit should be permitted for the pilot program, and took an advisory vote that recommended maintaining the $2 million per project funding limit.

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 Stakeholders Working Group. 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 Stakeholders
Working Group, 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.

**Program Application Forms.** Staff is still in the process of developing the program application form. The form is being designed to ensure that each application includes the information needed for a thorough evaluation of the projects. It 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 program’s ad hoc working group.

**Next Steps**

Following a recommendation from the TWG, the Pilot SGIP will be presented to the Regional Planning Committee and Transportation Committee at their May 6, 2005 meetings. Subject to the approval of these two Committees, the item would be scheduled for the May 27, 2005, Board of Directors meeting agenda.

Once the program has been 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 August.

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.
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 lose 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. Each project evaluation criterion is ranked on a scale from 0 to 5. Each criterion is then weighted by a factor from 1 to 4 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.

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 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.
Transit Facility Improvements will be scored according to how well the candidate project improves the environment for patrons at transit stations, along transit corridors, or at other access points in the immediate vicinity of a transit facility.

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 vehicle 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 strategies for how the project might be included in the Pilot SGIP. For instance, it may be possible to swap some of the TE funds with other funding sources (e.g., federal Congestion Mitigation and Air Quality (CMAQ) funds) that could be applied toward transit-related parking. Or, it may be possible to rearrange the public and private components of a project’s financing. For instance, a local jurisdiction may be asking a private land developer to construct sidewalk or streetscape enhancements in exchange for the jurisdiction contributing toward the construction of a parking structure. Because the pedestrian improvements are eligible under the TE program, the jurisdiction may wish to revise the agreement with the developer to apply the grant funds to the eligible TE uses.

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 development impact fee, developer agreement, or other appropriate sources, 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.

PART E. Low Income Household Bonus Points will be awarded to jurisdictions in which the percentage of low income households is greater than the 1999 regional average. This calculation is based on 1999 data as reported in the 2000 U.S. Census. Twenty-two points (15 percent of the total points) will be awarded to the following jurisdictions: National City, El Cajon, Imperial Beach, Lemon Grove, La Mesa, Escondido, Vista, Chula Vista, San Diego, and San Marcos as required by SANDAG Board of Directors action adopted on February 25, 2005.

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 described below, and the Federal Highway Administration’s federal-aid process.
## Pilot Smart Growth Incentive Program
### Draft Project Evaluation Criteria

### I. Project Screening Criteria

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>A. Local Commitment/Authorization</td>
<td>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.</td>
</tr>
<tr>
<td>B. Funding Commitment</td>
<td>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.</td>
</tr>
<tr>
<td>C. Funding Eligibility</td>
<td>The project must be eligible under the federal funding program guidelines.</td>
</tr>
</tbody>
</table>

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.

### II. Project Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
<th>Max. Points</th>
<th>Weight</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Project Readiness</td>
<td>To ensure the proposed projects can comply with the state's timely use of funds requirements, projects will be scored based on how close they are to beginning construction.</td>
<td>5</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>1. Intensity of Development (0-5 points)</td>
<td>Level of Project Development (Projects receive 1 point for each completed phase to a maximum of 5 points)</td>
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<tr>
<td></td>
<td>Feasibility Study</td>
<td>1</td>
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<td></td>
<td>Preliminary Engineering</td>
<td>1</td>
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<td></td>
<td>Environmental Clearance</td>
<td>1</td>
<td></td>
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<td></td>
<td>Right-of-way Acquisition</td>
<td>1</td>
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<tr>
<td></td>
<td>Final Design</td>
<td>1</td>
<td></td>
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<tr>
<td>2. Land Use and Transportation Characteristics of Project Area (0-5 points)</td>
<td>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.</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>3. Urban Design Characteristics of Project Area (0-5 points)</td>
<td>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 accommodate bicyclists and pedestrians.</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>4. Related Land Development Projects (0-5 points)</td>
<td>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?</td>
<td>5</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>5. Affordable Housing (0-5 points)</td>
<td>Does the project serve affordable (subsidized) housing? How much additional affordable housing is provided?</td>
<td>5</td>
<td>2</td>
<td>10</td>
</tr>
</tbody>
</table>

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.
II. Project Evaluation Criteria (cont’d)

<table>
<thead>
<tr>
<th>C. Quality of Proposed Project.</th>
<th>Max. Points</th>
<th>Weight</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
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</tr>
<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>
</tr>
<tr>
<td>2 Bicycle Access Improvements2 (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>
</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>
</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>
</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 features recommended in Planning and Designing for Pedestrians?</td>
<td>5</td>
<td>1</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>
</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 |

PROJECT SCORE SUBTOTAL: 125

E. Low Income Household Bonus Points3

TOTAL SCORE: 147

Notes

1Affordable housing is defined as income- or price-controlled housing. See the program guidelines for details.
2All bicycle facility improvements must comply with the requirements of the California Highway Design Manual, Chapter 1000.
3Low income household bonus points awarded per SANDAG Board policy (2/25/05).
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.
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 (RTP), MOBILITY 2030. The last update was completed 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 four years. This bill was passed by the House and sent to the Senate in mid-March. 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, strategic initiatives from the Regional Comprehensive Plan (RCP), 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.

The RTP Work Program was presented to the Stakeholders Working Group on Tuesday, March 15, 2005, and at a joint meeting of the Regional Planning Committee and Regional Transportation Committee on Friday, April 1, 2005.

**Discussion**

Staff will provide an overview of the preliminary elements and schedules for the concurrent RTP updates. 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.

Included with this item are five attachments. Attachment 1 is the 2006 RTP Schedule, and Attachment 2 is the 2007 RTP Schedule. Attachment 3, “2007 RTP Issue Papers,” provides more detail and the envisioned schedule for the various special analyses that would feed into the 2007 RTP. As they are developed over the course of the next year, these issues will be brought for
discussion to the various working groups and the Regional Planning and Transportation Committees.

Attachment 4, “RTP Work Program – 2006 and 2007 Updates,” outlines the major tasks and time frames associated with both the 2006 and 2007 RTP updates. Finally, Attachment 5, “2006 and 2007 RTP Milestones,” depicts the projected dates when milestone products or issues would be available for final review or action.

2007 RTP Issue Papers

SANDAG staff intends to produce several issue papers related to the development of the 2007 RTP. These papers highlight several of the unique inputs and analyses that will enhance the development of the RTP. A brief description of each issue paper and anticipated production schedule is shown on Attachment 3.

For example, two efforts are beginning that are independent of the RTP, but whose results will be incorporated into the 2007 RTP update. The first is the Independent Transit Planning Review, already scheduled to be conducted in 2005; this review is a follow-up action to the TransNet extension that was approved in November 2004. The results of this review will affect the transit network and service assumptions in the 2007 RTP. The second effort, Habitat Planning Issues, also is a result of the extension of TransNet, as work begins to set up habitat mitigation banks related to the development of transportation projects and identified funding.

Several other topics are routinely updated along with any RTP, but have a new focus with the adoption of the Regional Comprehensive Plan in 2004. They include land use forecasts, which include the Smart Growth Concept Map currently under development, a review of the Transportation Project Evaluation Criteria, and an update of the Regional Arterial System. However, the preparation of a Regional Freight Strategy is a new component under development specifically for the 2007 RTP.

Eight other issue papers cover new areas or expansion of recent studies. Five were identified early and include Cross-Border Travel, Interregional Travel, Energy Demand and Infrastructure, Tribal Development Issues, and Public Safety/Homeland Security. Three more recent subjects include Ground Access to the Regional Airport, Toll Facilities, and Network Improvements using HOV/Managed Lanes or General Purpose Lanes.

MHH/mh

Attachments
## 2006 Regional Transportation Plan Schedule

<table>
<thead>
<tr>
<th>MAJOR TASKS</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<tbody>
<tr>
<td>Update Revenue Scenarios</td>
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<td>Update Project Costs &amp; Phasing</td>
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<td>Create Scenarios and EIR Alternatives</td>
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<td>Prepare Draft RTP</td>
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<tr>
<td>Prepare Draft EIR</td>
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<td>Public Hearing</td>
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<td>Draft Final RTP</td>
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<tr>
<td>Adopt Final RTP</td>
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## 2007 Regional Transportation Plan Schedule

### MAJOR TASKS

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*Draft dated 3/25/05*
# 2007 RTP - Issue Papers Schedule

<table>
<thead>
<tr>
<th>TOPICS</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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<tbody>
<tr>
<td>Independent Transit Planning Review</td>
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<tr>
<td>Regional Freight Strategy</td>
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<td>Modal Planning</td>
<td>Intermodal Strategy</td>
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<td>Regional Arterial System</td>
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<tr>
<td>Transportation Project Eval. Criteria</td>
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<tr>
<td>Regional Airport Ground Access</td>
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To Be Determined
**2007 RTP Issue Papers**

Brief descriptions of topics to be covered in each issue paper are listed below. They have been grouped into the four major components of mobility from the 2030 MOBILITY RTP. Feedback from a March 15, 2005 meeting with the Stakeholders Working Group has been incorporated.

**SYSTEM DEVELOPMENT ISSUE PAPERS**

- **Independent Transit Planning Review.** The reassessment of the MOBILITY 2030 Transit Network would be completed by December 2005. The study involves a consultant and peer review group. At its completion, alternative networks may be recommended for analysis. This work should be done by March 2006 so that the entire transit/highway/arterial networks can be reviewed and go to the Board for inclusion in the draft RTP. In relation to the Independent Transit Review, members of the Stakeholders WG want the evaluation to include an evaluation of how well local service will connect with new regional services.

- **Regional Freight Strategy.** Staff will coordinate with rail, truck, ship, air, and pipeline 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. The intermodal strategy will be completed for the 2007 RTP.

- **Regional Arterial System.** The definition of a regional arterial and the selection of the Regionally Significant Arterial System should be reviewed and updated for the 2007 RTP. This should be done in context of the future TransNet development fee for regional facilities.

- **Transportation Project Evaluation Criteria.** This task is two-fold. First, SANDAG should develop a process to prioritize regional corridors for future improvements. Second, the existing project evaluation criteria in the RTP should be updated, giving more consideration to transportation projects that are tied to and promote smart growth development. Another category of projects that will have specialized evaluation criteria are Rail Grade Separation projects. The development of this issue paper also should consider whether intermodal projects from the regional freight strategy can be prioritized with other regional projects or should be considered separately. The criteria would be used to develop the networks for the 2007 RTP funding scenarios.

- **Regional Airport Ground Access.** The San Diego County Regional Airport Authority (the “Authority”) is conducting the Airport Site Selection Program, evaluating potential new airport sites that could provide sufficient airport capacity to meet the long-range needs of San Diego County residents. At the end of their studies, the Authority is slated to put their site recommendation on a countywide ballot no later than November 2006. Regardless of whether the regional airport moves to a new site or remains at Lindbergh Field, improved ground access is an important issue that directly affects the regional transportation system. While a decision may not be available in time for input and analysis in the 2007 RTP, SANDAG will continue to work closely with the Authority to coordinate this issue.

- **HOV/Managed Lanes and General Purpose Lanes.** The last RTP was guided by a Board-adopted vision that emphasized the movement of people, not vehicles, and by goals and objectives that focused on mobility. The Board may wish to reaffirm that vision, or revisit the issue of how best to provide additional capacity to the transportation network.
LAND USE/TRANSPORTATION CONNECTION ISSUE PAPERS

- **Smart Growth Concept Map.** A preliminary Smart Growth Concept Map, which illustrates locations where smart growth land uses are already planned or should be considered by local jurisdictions as they update their general plans, is expected to be completed by June 2005, with a final map to be completed by September 2005. This time frame would give staff the opportunity to create and discuss smart growth land use alternatives for analysis in the 2007 RTP.

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

- **Interregional Transportation Issues.** SANDAG staff is currently working with staff of the Western Riverside County Council of Governments (WRCOG) and Caltrans on Phase II studies of the I-15 corridor. These studies will include an evaluation of potential for increasing job opportunities in Riverside County, increased housing opportunities in San Diego County, and specific transportation facility and service improvements that should be planned to serve existing and future commuting patterns on the I-15 corridor. The outcomes of these studies would be presented. In addition, this issue paper will address 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?

- **Habitat Planning Issues.** The new TransNet-funded Environmental Mitigation Program is intended to improve the preservation of habitat areas associated with regional transportation projects. How will the new program be implemented related to identified Early-Action TransNet Projects and other projects in the 2007 RTP identified for early development?

- **Tribal Reservation Development Issues.** New development on tribal reservations has caused traffic impacts in rural areas. How can the region better assess the potential impacts on regional facilities from reservation development and plan for the transportation facilities needed to avoid related congestion? The analysis would be done in collaboration with the individual tribes to assess the existing and planned land uses on tribal lands, and incorporate to the greatest degree possible the travel generated from these sources along with the rest of the regional inputs.

DEMAND MANAGEMENT ISSUE PAPERS

- **Energy Demand and Infrastructure.** What types of Transportation Demand Strategies can affect the energy demands of the region for the movement 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?

SYSTEMS MANAGEMENT ISSUE PAPERS

- **Public Safety and Homeland Security.** This issue paper will evaluate the impacts of Homeland Security directives on the regional transportation system, as well as looking at issues related to improving safety on the highways and transit system. One issue of public safety brought up at the Stakeholders’ WG meeting was developing a regional strategy to deal with planned or unplanned events which shut down a major transportation corridor or facility.

- **Toll Facilities.** Toll facilities have been considered in other parts of the country and recently in California as a way to provide additional network capacity. The southern portion of State Route 125 was built in this manner. The analysis for the new RTP may want to include an alternative that assesses the impact of new or expanded freeway facilities that are operated as toll facilities.
RTP Work Program – 2006 and 2007 Updates

1. Establish Work Program (March 2005)
   - 2006 RTP based on federal 3-year cycle; 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.
   - 2006 RTP based on federal 3-year cycle; 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.
   - Review work program with SWG, RPTWG, CTAC (March 2005).
   - Take to the Transportation Committee / Regional Planning Committee (April 1, 2005).

2. Review RTP Goals and Policy Objectives (June 2005)
   - Incorporate RCP directives and Strategic Initiatives.
   - Incorporate Caltrans RTP Supplement guidelines.
   - Obtain direction from the Board for 2007 RTP (June 2005).

3. Develop and Review Issue Papers (March 2005–June 2006). These reports will be reviewed by the advisory and policy committees. Attachment 3 discusses these topics and their content in more detail.

4. Public Outreach and Involvement
   - 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 after the 2003 RTP.
   - 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-LU, 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 Direct Access Ramp (DAR) study
   - I-5 North Coast
   - Central I-5 HOV analysis
   - North South Transportation Corridor Analysis

   - Create Capacity File for Existing Plans and Policies (July 2005).
   - Generate New Existing Policies Forecast (December 2005).
   - Use Smart Growth Land Use Concept Map from September 2005 to generate land use alternative(s) for 2007 RTP analysis (March 2006).

8. **Update Performance Indicators**
   - The performance indicators used to measure the success of transit and highway networks should be reevaluated 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. Recommended changes and analyses from the Independent Transit Planning Review need to be developed in time to meet these deadlines.

    - 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 Working Groups and gain approval from TC and Board.

12. Perform Air Quality (AQ) forecasts
   - Address FTA/FHWA requirement for 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

### Committees and Working Groups

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<th>Milestones</th>
<th>CTAC</th>
<th>TWG</th>
<th>SWG</th>
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**Issue Papers:**

- Regional Freight Strategy:
  -Modal Plans: Jun-05, Jun-05, Jul-05
  -Intermodal Strategy: May-06, May-06, Jun-06
- Smart Growth Concept Map: Aug-05, Aug-05, Aug-05, Sep-05, Sep-05, Sep-05
- Cross-Border Travel: Nov-05, Nov-05, Nov-05, Dec-05, Dec-05
- Ind Transit Planning Review: Dec-05, Dec-05, Dec-05
- Regional Arterial System: Feb-06, Feb-06, Mar-06
- Interregional Travel: Feb-06, Feb-06, Feb-06, Mar-06, Mar-06
- Tribal Development Impacts: Feb-06, Feb-06, Feb-06, Mar-06, Mar-06
- Corridor/Project Evaluation Criteria: Feb-06, Feb-06, Feb-06, Mar-06, Mar-06, Apr-06
- Energy Impacts: May-06, May-06, May-06, Jun-06, Jun-06
- Habitat Planning
- Public Safety/Homeland Sec

**Updated Performance Indicators**

- Dec-05, Dec-05, Dec-05, Jan-06, Jan-06, Feb-06, Feb-06*

**Updated Land Use Forecasts**

- Mar-06, Mar-06, Mar-06, Mar-06, Mar-06, Apr-06

**Project Evaluation Criteria**

- Feb-06, Feb-06, Feb-06, Mar-06, Mar-06, Apr-06

**2007 Network/Funding Alts**

- May-06, May-06, May-06, Jun-06, Jun-06

**2007 Prelim Draft RTP**

- Aug-06, Aug-06, Jul-06

**2007 Draft RTP**

- Oct-06, Oct-06

**2007 Draft EIR**

- Nov-06

**Public Hearing RTP/EIR**

- Dec-06

**Results of Public Outreach**

- Jan-07, Jan-07, Jan-07

**Draft RTP Changes**

- Jan-07, Jan-07

**2007 Draft Final RTP**

- Feb-07, Feb-07

**Adopt Final 2007 RTP/EIR**

- Mar-07

**Air Quality Conformity Finding**

- Apr-07

*Public Workshop regarding draft issues papers and performance indicators.
April 14, 2005

TO: Regional Planning Technical Working Group

FROM: Carolina Gregor and Paul Kavanaugh, SANDAG Staff

SUBJECT: Smart Growth Concept Map: Generic Overlay Assumptions and Public Outreach Workshops

ACTION: DISCUSSION

Introduction

One of the Regional Comprehensive Plan's (RCP) 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.

At its last meeting, the Technical Working Group (TWG) reviewed a Preliminary Draft Smart Growth Concept Map, and initiated discussion on the draft assumptions for the generic overlays for the potential smart growth areas. Staff indicated that a revised draft map would be available for additional review at the April 14, 2005 TWG meeting. However, due to the volume of additional smart growth areas identified since the meeting and related technical issues that need discussion by the TWG (listed below), a revised concept map will be available instead at the May 12 TWG meeting.

Based on continuing discussions with local jurisdictions, it has been decided to illustrate the smart growth place types in a different way than they were shown on the Preliminary Draft Concept Map. While the initial map showed all smart growth areas as ¼-mile radius circles regardless of place type, future versions of the map will include specific planning boundaries for six of the seven place types -- Metropolitan Center, Urban Centers, Town Centers, Transit Corridors, Special Use Centers, and Rural Communities. Because of its smaller scale relative to the other six place types, the Community Center will continue to be shown as a ¼-mile radius circle.

In addition, the nearest transit stations will be overlaid on top of the specific planning boundaries with a ¼-mile radius circle around them to show the transit focus area(s) within the larger smart growth areas. Examples of a subregional map will be provided at the April 14, 2005 meeting to show and discuss the new method of illustrating the smart growth areas.
Discussion Questions

The TWG should discuss the following issues regarding the development of the Smart Growth Concept Map:

- **Generic Overlay Assumptions:** Areas identified on the Concept Map as Potential Smart Growth Areas will be assigned generic land use assumptions by place type. Alternatively, jurisdictions can provide specific assumptions for the potential areas, if preferred. This information will be used to generate alternative land use scenarios that will be considered as part of the RTP environmental assessment. The information is not intended to be used for the Regional Growth Forecast. (See description below in the Background section for additional details.)
  
  - Do members of the TWG agree with the generic assumptions provided in Attachment 1 and illustrated in Attachment 2 to be applied to potential smart growth areas?
  - What kind of changes, if any, should be made to the generic assumptions?

- **Public Outreach Workshops:** In partnership with local jurisdictions, SANDAG anticipates co-hosting a series of subregional workshops on the Smart Growth Concept Map this summer.
  
  - How focused or how broad should the workshops be? (Other related topics could include the RTP update, the Regional Housing Needs Assessment (RHNA), the Smart Growth Incentive Program (SGIP), the TransNet Environmental Mitigation Program, etc.)
  - How should the workshops be structured in order to obtain valuable input by local residents?
  - How can jurisdictions best involve local policymakers in the preparation of the Concept Map?
  - What kind of information should SANDAG provide at the workshops? What type of information should local jurisdictions provide?
  - What kinds of questions should be asked to generate a robust dialogue?
  - Which jurisdictions are interested in holding subregional workshops?

Background

Generic Overlay Assumptions

Draft land use assumptions, or “generic overlays,” are proposed for each potential smart growth area place type. The potential smart growth areas will be included in the Enhanced Smart Growth Land Use Scenario for the 2007 RTP update. They will not be included in the Series 11 Regional Growth Forecast.

The generic overlays will serve as "placeholders" for transportation modeling purposes until the potential areas "matriculate" into planned smart growth areas. If and when the potential areas
matriculate into planned areas, the land use assumptions from the general or specific plan would then be incorporated into the next update of the Regional Growth Forecast.

Attachment 1 includes recommended residential and employment intensity assumptions for the generic overlays. The 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 smart growth areas. Additionally, the generic overlays assume a particular mix of residential, employment, and commercial land uses, depending upon place type. Attachment 2 illustrates the potential physical design of the generic overlays, with the highest intensity housing and mixed uses located closest to transit stations.

Jurisdictions that have identified potential smart growth areas may choose to provide specific assumptions for those areas, rather than use the generic assumptions included in Attachment 1. If so, they should notify SANDAG staff by the end of May.
<table>
<thead>
<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>
<th>% Mix</th>
<th>Example Areas</th>
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<tbody>
<tr>
<td><strong>Urban Center</strong></td>
<td>40-75</td>
<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>
<td>60* 80 80</td>
<td>50** 150</td>
<td>0 20 15 15 40 10</td>
<td>Rio Vista, Little Italy, Morena, Linda Vista, UTC</td>
</tr>
<tr>
<td><strong>Town Center</strong></td>
<td>20-45</td>
<td>30-50</td>
<td>n/a</td>
<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>
<td>30* 40 40 40* 60 20</td>
<td>15 25 15 25 30 10</td>
<td>Downtown, El Cajon, Downtown Escondido, Downtown La Mesa, Downtown Oceanside, Hillcrest</td>
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<tr>
<td><strong>Community Center</strong></td>
<td>20-45</td>
<td>n/a</td>
<td>n/a</td>
<td>High frequency service (15 minute in peak hours) on corridor/regional services. Moderate to high frequency throughout the day.</td>
<td>30* 25 30 n/a 45 20</td>
<td>15 25 5 15 25 10</td>
<td>Otay Ranch Villages, Downtown Lemon Grove, Downtown Coronado, Mercado (Barrio Logan), Palm Ave (Imperial Beach)</td>
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<tr>
<td><strong>Transit Corridor</strong></td>
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<td>High frequency service (15 minute in peak hours) on corridor/regional and/or local services.</td>
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<td>20 35 20 35 35 30</td>
<td>Adams Avenue (Normal Heights), El Cajon Boulevard, University Avenue, Washington Avenue, The Paseo at SDSU</td>
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<tr>
<td><strong>Special Use Center</strong></td>
<td>50+ (optional)</td>
<td>45+</td>
<td>n/a</td>
<td>High to very high frequency (15 minute or better in peak) on corridor/regional services. Moderate to high frequency throughout the day.</td>
<td>50** (optional) TBD TBD 45** TBD</td>
<td>TBD</td>
<td></td>
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<tr>
<td><strong>Rural Community</strong></td>
<td>10.9-24+</td>
<td>n/a</td>
<td>n/a</td>
<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>
<td>15* 10 10 n/a 30</td>
<td>20 10 10 30 20 10</td>
<td>Fallbrook, Ramona, Lakeside</td>
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</tr>
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</table>

**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.
Attachment 2 – Generic Overlay Land Use Assumptions for Potential Smart Growth Areas

**Urban Center**

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<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<td>0</td>
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<tr>
<td>Multifamily</td>
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<td>25</td>
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<tr>
<td>Office</td>
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<td>19</td>
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<tr>
<td>Retail</td>
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<tr>
<td>Roads</td>
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<tr>
<td>Other</td>
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</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
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**Town Center**

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<td>Multifamily</td>
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<td>Office</td>
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<td>19</td>
</tr>
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<tr>
<td>Other</td>
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<td><strong>Total</strong></td>
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**Community Center**

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<tr>
<td>Multifamily</td>
<td>25%</td>
<td>31</td>
</tr>
<tr>
<td>Office</td>
<td>5%</td>
<td>6</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
<td>19</td>
</tr>
<tr>
<td>Roads</td>
<td>25%</td>
<td>32</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td><strong>126</strong></td>
</tr>
</tbody>
</table>

**Rural Community**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family</td>
<td>20%</td>
<td>25</td>
</tr>
<tr>
<td>Multifamily</td>
<td>10%</td>
<td>13</td>
</tr>
<tr>
<td>Office</td>
<td>10%</td>
<td>13</td>
</tr>
<tr>
<td>Retail</td>
<td>30%</td>
<td>37</td>
</tr>
<tr>
<td>Roads</td>
<td>20%</td>
<td>25</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td><strong>126</strong></td>
</tr>
</tbody>
</table>
TransNet Environmental Mitigation Program

In 1987, voters approved the TransNet program — a half-cent sales tax to fund a variety of important transportation projects throughout the San Diego region. This 20-year, $3.3 billion transportation improvement program expires in 2008. In November 2004, 67 percent of the region’s voters supported the extension of TransNet to 2048 – thereby generating an additional $14 billion distributed among highway, transit, and local road projects.

A unique component of the 2004 ballot measure was the creation of an environmental mitigation program (EMP), which includes an allocation for the estimated direct costs for mitigation of upland and wetland habitat impacts for regional and local transportation projects. The focus of the program is to mitigate environmental impacts of regional and local transportation projects while implementing the Multiple Species Conservation Program (MSCP) and the Multiple Habitat Conservation Program (MHCP), and future amendments to these programs.

The ballot measure identified $850 million to be used for the EMP. The EMP principles state that two funds shall be established. The first one, a “Transportation Project Mitigation Fund” covers direct mitigation costs for regional and local transportation projects estimated to be $650 million ($450 million for regional projects, $200 million for local projects).

These funds will be used for the mitigation needs of the 47 major transportation infrastructure improvement projects and programs identified in the TransNet extension. Although the extension does not begin until April 2008, an “early action program” has been designed to address priority projects. Satisfying the mitigation requirements for these priority projects will be addressed comprehensively rather than on a project-by-project basis in order to maximize early land acquisition opportunities.

The early action TransNet projects include the widening of SR 76 between Melrose Drive and I-15, the extension of SR 52 from SR 125 to SR 67, the Mid-Coast regional transit extension from Old Town to University City, the I-15 Managed

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TransNet Extension
Environmental Mitigation Program (EMP)
(In millions, 2002 dollars)

- TRANSPORTATION PROJECT MITIGATION FUND $650m
- LOCAL TRANSPORTATION PROJECT MITIGATION $200m
- REGIONAL HABITAT CONSERVATION FUND $150m
- Major Highway & Transit Project Mitigation $450m
- Mitigation Fund $50m

Total EMP: $850 million

Plus up to $30m in financing costs for advanced habitat acquisition
Lanes Corridor from SR 78 to SR 163, the I-15 managed lanes, the SR 52 managed Lane/HOV project from I-15 to SR 125, the I-5 north coast corridor projects, and the I-805 corridor projects.

The second fund, a “Regional Habitat Conservation Fund” will be approximately $200 million ($150 million for regional projects and $50 million for local projects). These funds will be made available for regional habitat acquisition, management, and monitoring activities necessary to implement the MSCP and the MHCP. Funds are estimated based on the economic benefit derived from purchasing land with the “Transportation Project Mitigation Fund” in advance of need in larger blocks at a lower cost, and with mitigation ratios predetermined and held constant over time for each of the habitat conservation plans. The Environmental Mitigation Program guidelines identify up to $30 million in financing costs allocated from the expenditure plans.

The Environmental Mitigation Program will be a collaborative effort among SANDAG, the region’s jurisdictions, the Wildlife Agencies (California Department of Fish and Game and the US Fish and Wildlife Service), and other regulatory agencies (Coastal Commission, US Army Corps of Engineers, Environmental Protection Agency, and the Regional Water Quality Control Board) as well as from the environmental community and the science/technical community. Next steps include establishing a regional entity that will be responsible for the allocation of funding included in the “Regional Habitat Conservation Fund.”

**What do we mean by “Economic Benefit?”**

With today’s rising land prices, we know that if we buy land today, it will cost less than if we wait and buy it later. Smart investors know this, which is why land in Southern California is at a premium.

Transportation projects will be built over the next 30 years depending on need and funding availability. Whenever a project impacts sensitive habitats, mitigation lands must be acquired prior to the issuance of permits. If land is purchased in advance of need, with mitigation ratios held constant over time, an economic benefit is derived because the mitigation obligation is known and the land is purchased at today’s prices. The savings derived by purchasing land today, rather than at some time in the future, constitutes the economic benefit.
**TransNet Extension**

Environmental Mitigation Program (EMP)

*(in millions, 2002 dollars)*

- **TRANSPORTATION PROJECT MITIGATION FUND** $650m
- **Local Transportation Project Mitigation** $200m
- **Major Highway & Transit Project Mitigation** $450m
- **REGIONAL HABITAT CONSERVATION FUND** $200m

**Total EMP: $850 million**

*Plus up to $30m in financing costs for advanced habitat acquisition*
TransNet Extension
40-Year Expenditure Plan
(in billions, 2002 dollars)

Major Highway & Transit Projects (47) $4.65b

New BRT/Rail Operations $1.1b

Transit Services $2.24b

Local Streets & Roads $3.95b

Financing Cost $0.5b

Environmental Mitigation $0.6b

Environmental Mitigation Local $0.25b

Smart Growth $0.28b

Administration $0.14b

Bike & Pedestrian $0.28b

Oversight Committee (Not shown) $0.01b

Total Program: $14 billion