

Planning Advisory Committee/SMART Corridor Working Group

AGENDA

Thursday June 16, 2005
9:00am – 11:00 am

Petaluma Community Center
320 North McDowell Blvd.
Petaluma

- I. Introductions and public comment on items not on agenda
 - II. Reports – INFORMATION/DISCUSSION
 - A. Announcements, information sharing
 - B. SCTA - Update on Measure M – Strategic Plan is available online at www.sctainfo.org
 - III. MTC's TOD policy development- discussion of final SMART Corridor TOD policy – attachments
 - IV. Station Area Planning Program – updates, next steps
 - V. Local Smart Growth Policy – next steps for public outreach and integration with TPLUS citizens committee
 - VI. Travel Demand Modeling Program Update - attachment
 - VII. Adjourn – ACTION
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DISABLED ACCOMMODATION: If you have a disability that requires the agenda materials to be in an alternative format or that requires an interpreter or other person to assist you while attending this meeting, please contact the SCTA at least 72 hours prior to the meeting, to ensure arrangements for accommodation.

Staff Report

To: SMART Corridor Working Group
From: SCTA staff
Re: MTC's SMART Corridor TOD Policy
Date: June 16, 2005

Issue:

What recommendations does the PAC have regarding MTC's Transit-Oriented Development (TOD) Policy for the SMART corridor?

Background:

MTC staff has been directed to further discuss details of the policy with Corridor Working Groups. Issues of primary concern are the following:

- threshold levels
- inclusion of jobs criteria
- affordable housing

Threshold spreadsheet:

SCTA staff has developed a spreadsheet of current and planned conditions for housing units and jobs within the ½ mile radius of the SMART Station (attached). The information contained within the spreadsheet has come from the planning departments of each city, and is still being updated. It is critical that these numbers, existing and planned, are as accurate as possible, so that the policy is realistic and can be implemented.

It is important to remember that the thresholds are measured as a corridor average. Not every station will necessarily meet these goals. Some stations will exceed the thresholds. Please take a look at the attached spreadsheet and let us know if you anticipate any changes.

Inclusion of jobs criteria:

Although this is a difficult criteria to plan and measure, jobs have been kept in the criteria because employment centers are a natural component of a commuter trip. What is anticipated along the SMART Corridor? How important is the jobs criteria within the ½ mile radius of Stations?

Affordable housing

Most cities have inclusionary policies for affordable housing. MTC currently has an option included in the policy that counts affordable housing for more than other housing. Is this a useful option? How would the Corridor Working Group address this issue?

Action

Consider the MTC TOD policy. Direct MTC staff on the specific issues above and other issues as necessary.

MTC Resolution 3434 Draft TOD Policy For Regional Transit Expansion Projects

1. Purpose

The Metropolitan Transportation Commission (MTC) is developing a set of policies and programs to improve the integration of transportation and land use in the Bay Area—including a specific policy to condition the allocation of regional discretionary transit funds under MTC’s control, provided by Resolution 3434, on supportive land use policies for station areas and corridors included in the region’s transit expansion program. This policy is designed to improve the cost-effectiveness of regional investments in new transit expansions, ease the Bay Area’s chronic housing shortage, create vibrant new communities, and help preserve regional open space. The policy will encourage transportation agencies, local jurisdictions, members of the public and the private sector to work together to create development patterns that are more supportive of transit. Project sponsors shall indicate how they will satisfy the TOD policy requirements as a condition for receiving regional discretionary transit investments under Resolution 3434.

There are three key elements of the regional TOD policy:

- (a) Corridor-level thresholds to quantify appropriate minimum levels of development around transit stations along new corridors;
- (b) Local station area plans that address future land use changes, station access needs, circulation improvements, pedestrian-friendly design, and other key features in a transit-oriented development;
- (c) Corridor working groups that bring together CMAs, city and county planning staff, transit agencies, and other key stakeholders to define expectations, timelines, roles and responsibilities for key stages of the transit project development process.

2. TOD Policy Application

The TOD policy only applies to physical transit extensions funded in Resolution 3434 (see Table 3). The policy applies to any physical transit extension project with regional discretionary funds, regardless of level of funding. Resolution 3434 investments that only entail level of service improvements or other enhancements without physically extending the system are not subject to the TOD policy requirements.

3. Definitions and Conditions of Funding

For purposes of this policy “regional discretionary funding” consists of the following sources identified in the Resolution 3434 funding plan:

- FTA Section 5309- New Starts
- FTA Section 5309- Bus and Bus Facilities Discretionary
- FTA Section 5309- Rail Modernization
- Regional Measure 1- Rail (bridge tolls)
- Regional Measure 2 (bridge tolls)
- Interregional Transportation Improvement Program
- Interregional Transportation Improvement Program-Intercity rail
- Federal Ferryboat Discretionary

These regional funds may be programmed and allocated for environmental and design related work, in preparation for addressing the requirements of the TOD policy. Regional funds may be programmed and allocated for right-of-way acquisition in advance of meeting all requirements in the policy, if land preservation for TOD purposes is essential. No regional funds will be programmed and allocated for construction until the requirements of this policy have been satisfied. See Table 2 for a more detailed overview of the planning process.

4. Corridor-Level Thresholds

Each transit extension project funded in Resolution 3434 must plan for a minimum number of housing units and a combined number of housing units and jobs along the corridor. These corridor-level thresholds vary by mode of transit, with more capital-intensive modes requiring higher numbers of housing units and jobs (see Table 1). The corridor thresholds have been developed based on potential for increased transit ridership, exemplary existing stations sites in the Bay Area, local general plan data, predicted market demand for TOD-oriented housing and jobs in each county, and an independent analysis of feasible development potential in each transit corridor.

Meeting the corridor level thresholds requires that—within a half mile of all stations—a combination of existing land uses and planned land uses meets or exceeds the overall corridor threshold for housing and jobs (see Table 1);

Physical transit extension projects that do not currently meet the corridor thresholds with development that is already built will receive the highest priority for the award of MTC's Station Area Planning Grants.

To be counted toward the threshold, planned land uses must be adopted at a minimum through both general plans and zoning codes. General plan language alone without zoning changes is not sufficient for the purposes of this policy. Ideally, planned land uses will be formally adopted through a specific plan (or equivalent), zoning codes and general plan amendments along with an accompanying programmatic Environmental Impact Report (EIR) as part of the overall station area planning process.

An existing end station is included as part of the transit corridor for the purposes of calculating the corridor thresholds;

New below-market housing units will receive a 20 percent bonus toward meeting the corridor threshold (i.e. one planned below-market housing unit counts for 1.2 housing units for the purposes of meeting the corridor threshold. Below market for the purposes of the Resolution 3434 TOD policy is affordable to 60% of area median income for rental units and 100% of area median income for owner-occupied units);

The local jurisdictions in each corridor will determine the job and housing placement, type, density, design, etc.

**TABLE 1: CORRIDOR THRESHOLDS
HOUSING UNITS AND JOBS – AVERAGE PER STATION AREA**

Project Type	BART	Light Rail	Bus Rapid Transit	Commuter Rail	Ferry
Threshold					
Combined Housing Units and Jobs Threshold	13,000	8,000	6,000	5,000	1,500
Housing Unit Minimum	(3,500)	(3,000)	(2,500)	(2,000)	(300)

Each corridor is evaluated for the Combined Housing Units and Jobs Threshold. The Housing Minimum indicates the minimum portion of the total threshold that must be met through housing. Either housing units or jobs may be used to satisfy the remainder of the combined threshold.

For example, a four station commuter rail extension (including the existing end-of-the-line station) would be required to meet a corridor-level threshold of 20,000 jobs and housing units. The corridor must meet this threshold with a minimum of 8,000 housing units – the difference can be made up with either 12,000 housing units or jobs or a combination of both.

Threshold figures above are an average per station area based on both existing land uses and planned development within a half mile of all stations. New below market rate housing is provided a 20% bonus towards meeting housing unit threshold.

It is essential to note that developing vibrant transit villages and quality transit-oriented development throughout the region—and building places that people will want to live, work, shop and spend time in—will not be accomplished simply through more housing and jobs. Parks, shops, neighborhood services, street design, block size, parking policies and design features that enhance community character are all critical elements of creating successful transit-oriented developments. MTC believes that these are issues that are best addressed locally on a station-by-station basis as part of the proposed Station Area Plan process.

5. Station Area Plans

Each proposed transit project seeking funding through Resolution 3434 must demonstrate that the thresholds for the corridor are met through existing development and adopted station area plans that commit local jurisdictions to a level of housing and jobs that meets the threshold. This requirement may be met by existing station area plans accompanied by appropriate zoning and implementation mechanisms. If new station area plans are needed to meet the corridor threshold, MTC will assist in

funding the plans. The Station Area Plans shall be conducted by local governments in coordination with transit agencies, Association of Bay Area Governments (ABAG), Metropolitan Transportation Commission (MTC) and the Congestion Management Agencies (CMAs).

At a minimum, Station Area Plans will define both the land use plan for the area as well as the policies—zoning, design standards, parking policies, etc.—for implementation. The plans shall at a minimum include the following elements:

Current and proposed land use by type of use and density within the ½ mile radius, with a clear identification of the number of existing and planned housing units and jobs;
Station access and circulation plans for motorized, non motorized and transit access;
Transit ridership estimates and estimates of patrons walking from the station area to the station itself;
Design policies and standards, including provisions for mixed use developments and pedestrian-scaled block size, to promote the livability and walkability of the station area;
Analysis of future TOD-related parking demand and parking requirements for station area land uses, including pricing and provisions for shared parking;
Implementation plan for the station area plan, including local policies required for development per the plan, market demand for the proposed development, potential phasing of development and demand analysis for proposed development.

MTC will rely on existing TOD design guidelines that have already been developed by ABAG, local jurisdictions, transit agencies, the CMAs and others. MTC will work with ABAG to provide more specific guidance on the issues listed above that must be addressed in the station area plans and references and information to support this effort.

6. Corridor Working Groups

Each of the transit extensions subject to the corridor threshold process, as identified in Table 3, will need a Corridor Working Group—many already have a working group that may be adjusted to take on this role. The Corridor Working Group shall be coordinated by the relevant CMAs, and will include the sponsoring transit agency, the local jurisdictions in the corridor, and representatives from ABAG, MTC, and other parties as appropriate.

The Corridor Working Group will assess whether the planned level of development satisfies the corridor threshold as defined for the mode, and assist in addressing any deficit in meeting the threshold by working to identify opportunities and strategies at the local level. This will include the key task of distributing the required housing units and jobs to each of the affected station sites within the defined corridor.

The goal of the Corridor Working Group is to connect the development of station area planning with the development of the transit project—creating transit stations that strengthen local communities and promote local development patterns that effectively support the transit system. As outlined in Table 2, the Corridor Working Group will continue with corridor evaluation and station area planning until the corridor threshold is met and supporting Station Area Plans are adopted by the local jurisdictions.

MTC will confirm that each corridor meets the jobs and housing threshold prior to the release of regional discretionary funds for construction of the transit project.

**TABLE 2:
Regional TOD Policy Implementation Process
for Transit Extension Projects**

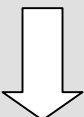
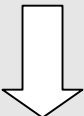
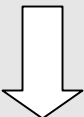
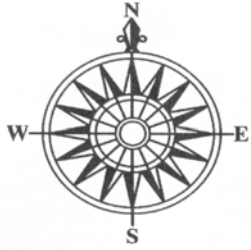
Transit Agency Action	City Action	MTC/CMA/ABAG Action
<p>All parties establish Corridor Working Group to address corridor threshold. Conduct initial corridor performance evaluation, coordinate station area planning</p> <p style="text-align: center;"></p>		
Environmental Review/ Preliminary Engineering /Right-of-Way	Conduct Station Area Plans	Coordination of corridor working group, funding of station area plans
<p><i>Step 1 Threshold Check: (a) corridor has sufficient existing development or current plans in place to meet the corridor development thresholds; If not then (b) Station Area Plans are completed by the time the environmental document is certified.</i></p> <p style="text-align: center;"></p>		
Final Design	Adopt Station Area Plans. Revise general plan policies and zoning, environmental reviews	Regional and county agencies assist local jurisdictions in implementing station area plans
<p><i>Step 2 Threshold Check: (a) local policies adopted for station areas; (b) implementation mechanisms in place per adopted Station Area Plan by the time Final Design is completed.</i></p> <p style="text-align: center;"></p>		
Construction	Implementation (financing, MOUs) Solicit development	TLC planning and capital funding, HIP funding

TABLE 3:
Resolution 3434 Transit Extension Projects Subject to Corridor Thresholds

Project	Sponsor	Type
BART East Contra Costa Rail Extension	BART/CCTA	Commuter Rail
BART Fremont to San Jose	BART/VTA	BART extension
AC Transit Berkeley/Oakland/San Leandro Bus Rapid Transit: Phase 1	AC Transit	Bus Rapid Transit
Caltrain Downtown Extension/Rebuilt Transbay Terminal	TJPA	Commuter Rail
MUNI Third Street LRT Project Phase 2 – New Central Subway	MUNI	Light Rail
Sonoma-Marin Rail	SMART	Commuter Rail
Dumbarton Rail	SMTA, ACCMA, VTA, ACTIA, Capitol Corridor	Commuter Rail
BART/ Oakland Airport Connector	BART	BART
Expanded Ferry Service Phase 1: Berkeley, Alameda/Oakland/Harbor Bay, and South San Francisco to SF	WTA	Ferry
Expanded Ferry Service Phase 2: Alameda to South San Francisco, and Hercules, Antioch, Treasure Island, Redwood City and Richmond to SF.	WTA	Ferry

Note: The Downtown San Jose/East Valley: Santa Clara/Alum Rock Corridor and Capitol Expressway LRT Extension is a Resolution 3434 transit extension project that is currently funded entirely with local funds. The TOD policy would only apply to this project if the project sponsor requested any regional discretionary funds.



Staff Report

To: Planning Advisory Committee

From: Janet Spilman

Re: SCTA TOD Policy

Date: June 16, 2005

Issue:

What public outreach is necessary for the next phase of policy development?

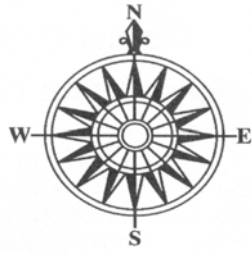
Background:

SCTA has convened a TPLUS committee to develop a policy for smart growth and transit oriented development. In April the PAC approved a draft policy outline.

Staff now requests the PAC create a subcommittee to help plan the outreach phase.

Staff Recommendation:

Create a subcommittee for the purpose of public outreach.



Staff Report

To: Sonoma County Transportation Authority
From: Elijah Henley, Senior Transportation Planner
Re: Travel Demand Modeling Program Update
Date: June 13, 2005

Issues:

1. Review of Rohnert Park modeling project
2. Overview of new Santa Rosa modeling project
3. Development of administrative guidelines for program operations

Rohnert Park Modeling Project:

Since the last modeling program update provided to the SCTA in February, SCTA staff has been working closely with staff and consultants in Rohnert Park to analyze specific projects in relation to the cumulative development anticipated for the city in 2020. In the process, both the county model and city model were used, and all updated land use assumptions compiled by the city were loaded into the newly created TransLand (transportation – land use) database. Once the updates were imported into TransLand, the data were then aggregated and added to the appropriate county modeling tables. Additionally, SCTA staff developed separate land use scenarios for each specific area plan currently in the planning process (at varying stages) throughout the city.

From a program development standpoint, the main purpose of this exercise was to validate the use of the new modeling system in multiple configurations. When the project was initiated, SCTA staff hoped to show that the current development model outputs (specific area planning scenarios) would be consistent with the general plan model outputs produced by both the county and city. Additionally, staff hoped to demonstrate how the new modeling system could be used to more accurately estimate the proportional impact of any given proposed project in relation to the cumulative impact of all planned development anticipated to be on the ground in 2020.

Project Results:

Overall, the project was successful in meeting the goals set by SCTA staff. Using the automated features built into TransLand, SCTA staff was able to prepare modeling scenarios to run the city and county model interchangeably without any manual tabulation of land use data. Additionally, the current development model outputs proved to be consistent with the general plan model outputs of both the county and city. Staff was also able to use a set of post-modeling analytical functions built into the modeling software to estimate the proportional impact of any given project in relation to the total impact of all development anticipated in 2020. The only unfavorable performance issue was some inconsistency between observed traffic counts and base year model volumes at certain locations. Moving onto the next big modeling project, SCTA staff has made addressing this deficiency a top priority.

Santa Rosa Modeling Project:

The Santa Rosa Public Works Department is in the initial stages of conducting an update and re-calibration¹ of their city model. Similar to how the Rohnert Park city model is configured, the Santa Rosa city model also nests within the county model's Traffic Analysis Zone (TAZ) configuration. Thus, SCTA staff is partnering with city staff to update and re-calibrate the county model in coordination with the city model update. The inaccuracies identified in the previous modeling project will be addressed in the re-calibration process.

The updating process will focus primarily on assembling the land use changes that have occurred in the city since 1999. Fortunately, the city's Community Development Department has developed a set of land use databases that are updated frequently, and these data are made available to SCTA staff. In exchange for receiving these data, SCTA staff has agreed to integrate the city model in the county modeling system and maintain it as new land use updates are made throughout the county. Staffs from the city and SCTA are in agreement that this project is a tremendous opportunity for all agencies involved to pool resources and set up an automated process for maintaining both models in an integrated countywide modeling system.

Establishing Operational Guidelines:

Since taking over management of the county model, SCTA staff has become increasingly more occupied responding to data requests from cities and consultants actively conducting traffic studies related to pending development projects. Because this is an entirely new program function for the SCTA, there are currently no operational guidelines that set the parameters for when and how the model could or should be used. SCTA staff needs to draft an administrative document that will address the operational questions listed below for the Boards consideration.

1. What Type of Land Use Updating Schedules Should be Established?

Probably the most challenging aspect of managing the new modeling program is keeping track of changes to land use as they occur throughout the county. Although the creation of the TransLand database greatly improves SCTA staff's ability to load, archive, modify, and disseminate land use data once new data become available, there currently aren't regularly scheduled land use updates in place for most jurisdictions throughout the county. Where there are regularly scheduled updates (in Santa Rosa and Petaluma), SCTA staff has successfully negotiated informal data sharing arrangements that allow for the cities' updates to be incorporated in the new modeling system when they occur. In order to ensure the greatest level of model accuracy, it is critically important that all jurisdictions working through SCTA's Planning Advisory Committee (PAC) and Technical Advisory Committee (TAC) establish a set of land use updating schedules that take into account the varying levels of agency resources and staff time available to support this effort. Ideally, SCTA staff would like to have a complete countywide land use update every three years to coincide with the Comprehensive Transportation Plan (CTP) update schedule. These system wide updates would then be supplemented by intermittent updates from jurisdictions that update their land use more frequently.

2. What Types of Data Products and Services Should the SCTA Provide?

The main challenge now facing SCTA staff is making the determination which data requests should be filled and what requests exceed the work scope of the new modeling program. In the process of continually adding land use updates, SCTA will be producing updated model outputs for continually shifting base years and horizon years. As new data is processed, SCTA staff intends to make these updates readily available to the jurisdictions or consultants who might request them, and these model updates will be made available in multiple formats depending on varying need and/or preference.

¹ Model calibration is the process of making mathematical adjustments to the model in order to better align outputs to existing traffic counts and observed travel behavior.

Because these periodic updates are necessary to better support SCTA's countywide transportation planning function, the dissemination of the data clearly falls within the work scope of the program. However, these basic updates are typically only the starting point of any specific area traffic studies, and SCTA staff very well might be asked to make modifications to these baseline data to better isolate the anticipated impacts of the development project being analyzed. In these cases, procedural guidelines need to be established that clearly delineate what products and services the SCTA will and won't readily make available.

3. What Type of New Cooperative Agreements Need to be Establish?

In situations where the determination is made that a data request exceeds the day-to-day operations of the SCTA modeling program, supplemental service fees could be implemented. Extensive post-modeling computation applied to the baseline data would be such a situation. In cases that do entail extensive scenario planning for a particular project, SCTA staff would make the baseline data available and work with the jurisdiction and their consultants to develop the scenarios. The new data produced in the process would then to be made available to the SCTA for possible incorporation in the countywide system.

In order to ensure that the modeling needs of each jurisdiction are addressed, formalized cooperative agreements most likely need to be included in the program guidelines. As SCTA staff works with their counterparts throughout the county, any initial model re-configuration needed to better address the particular needs of any given jurisdiction would be provided by SCTA as part of it's program work scope.

Fiscal Impacts:

In FY03/04 and FY04/05, SCTA staff spent \$28,400 in consulting fees and an additional \$7,700 on software. For FY05/06, staff has requested \$22,000 to cover anticipated consultant costs and necessary software maintenance fees and upgrades.

Staff Recommendation:

In order to adequately address the operational challenges outlined in this report, SCTA staff recommends that the SCTA direct the PAC and TAC to draft a cooperative work agreement that includes provisions responsive to the following operational areas:

1. Developing a more clearly defined work scope for SCTA's new modeling program,
2. Establishing land use updating schedules,
3. Developing a list of data products and services that should be provided by SCTA, and
4. Developing supplemental service fees to compensate SCTA for work that falls outside its defined work scope.