HORIZON

Regional Growth Strategies

Perspective Paper #3 – Work to Date/Preview

Mark Shorett – ABAG Regional Planning Committee

October 3, 2018

Horizon is exploring how **economic, environmental, technological, and political uncertainties** may create new challenges – or exacerbate existing ones – for the Bay Area over the coming decades.

H O R I Z O N

Futures Planning

Perspective Papers

Project Performance

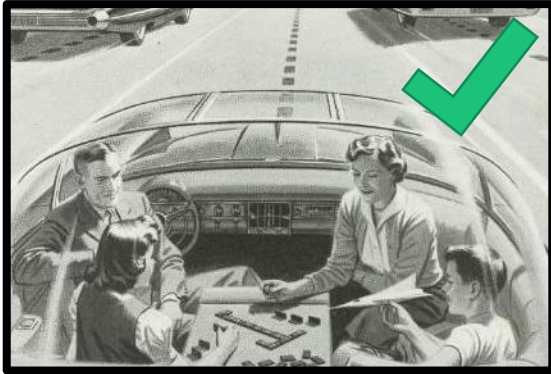PLAN BAY AREA 2050

For more information, go to:
bayareametro.gov/horizon

Perspective Papers

1) Autonomous Vehicles

2) Toward a Shared Future

3) Growth Strategies
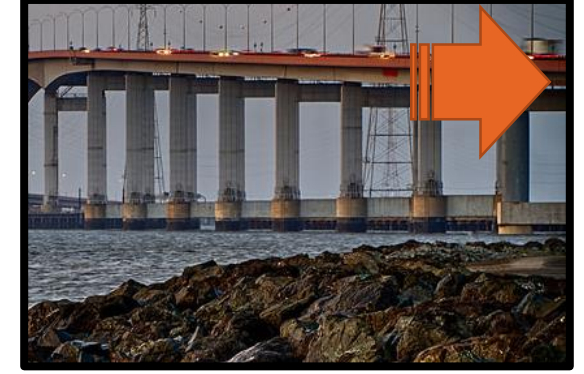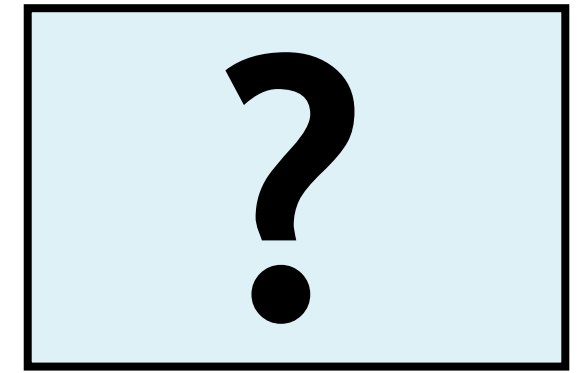
4) Crossings

5) Future of Jobs

6) Governance

7) Sea Level Rise

More to Come?

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Perspective Paper 3: Regional Growth Strategies
Purpose

To identify successes and shortcomings with the current PDA-centric growth framework

To investigate potential new options for meeting regional housing needs and reducing GHG emissions, while aligning with Horizon Guiding Principles

To develop planning, policy, and funding strategies for each option

To spur a larger conversation about updating the regional growth framework next year in preparation for Plan Bay Area 2050

Perspective Paper 3
Work to Date
Overview of Today's Presentation

1 What is a regional growth framework?

2 How is our current framework doing?

3 What's missing from our current framework?

4 What are some options & strategies going forward?

Paper 3 slated for release in December/January
Seeking input this month from stakeholders

Overview

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Overview of Today's Presentation

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2 How is our current framework doing?

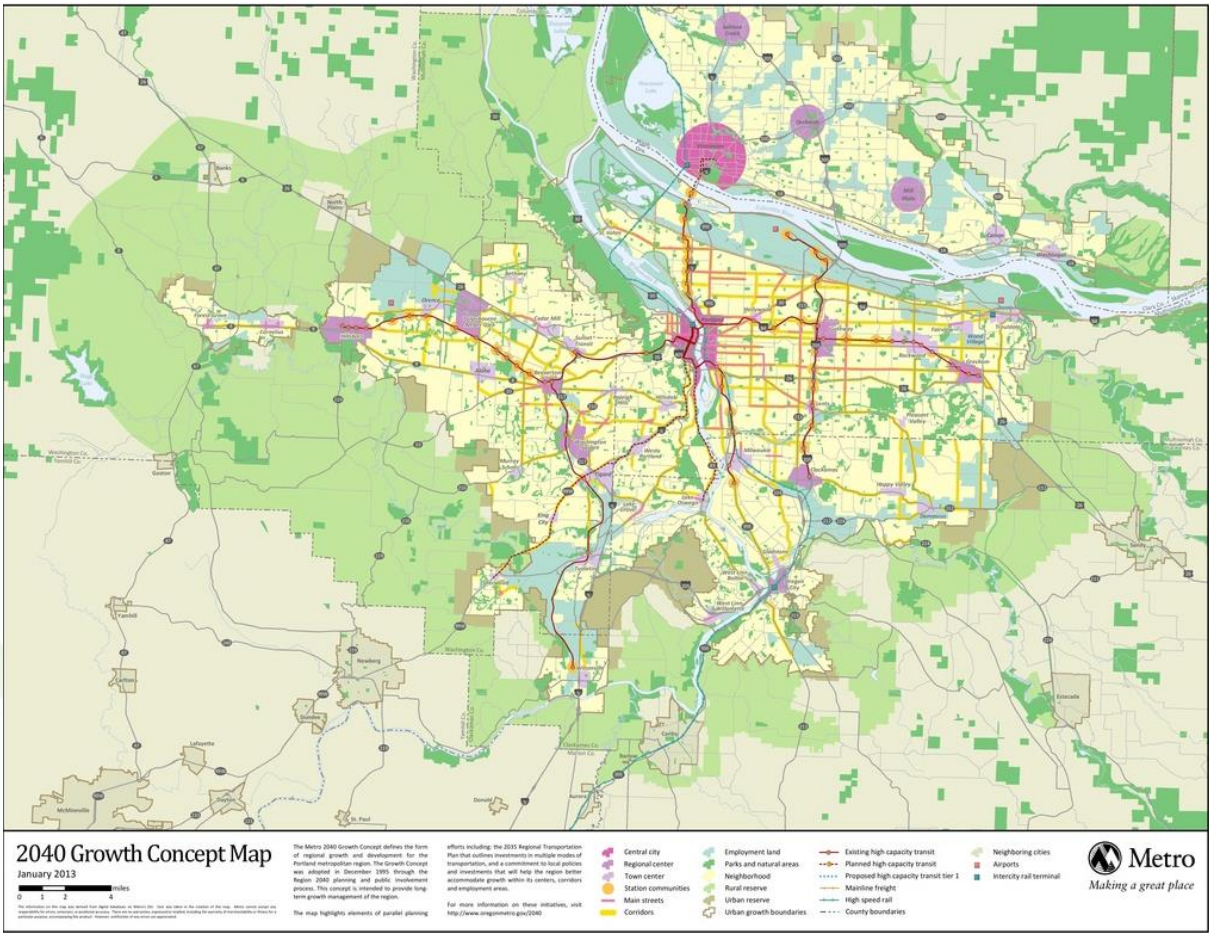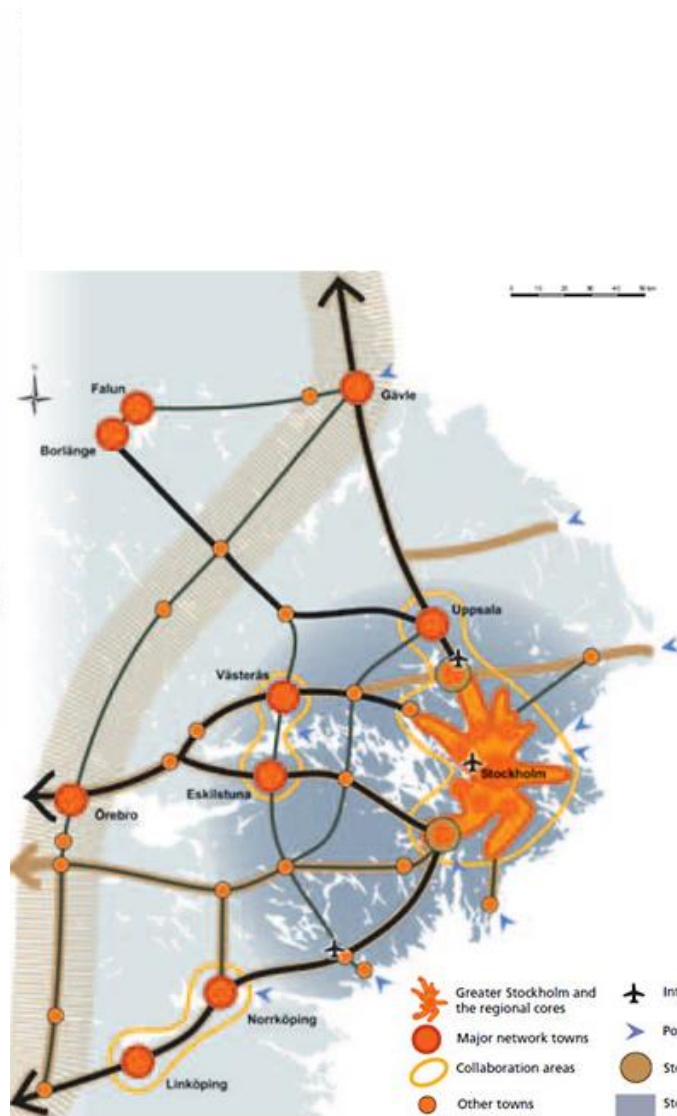**3** What's missing from our current framework?

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Overview

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Examples from Across the Globe

Growth Frameworks for the Bay Area

Regional Plan (1970)

Plan Bay Area (2013)

Non-urbanized land

Urbanized land
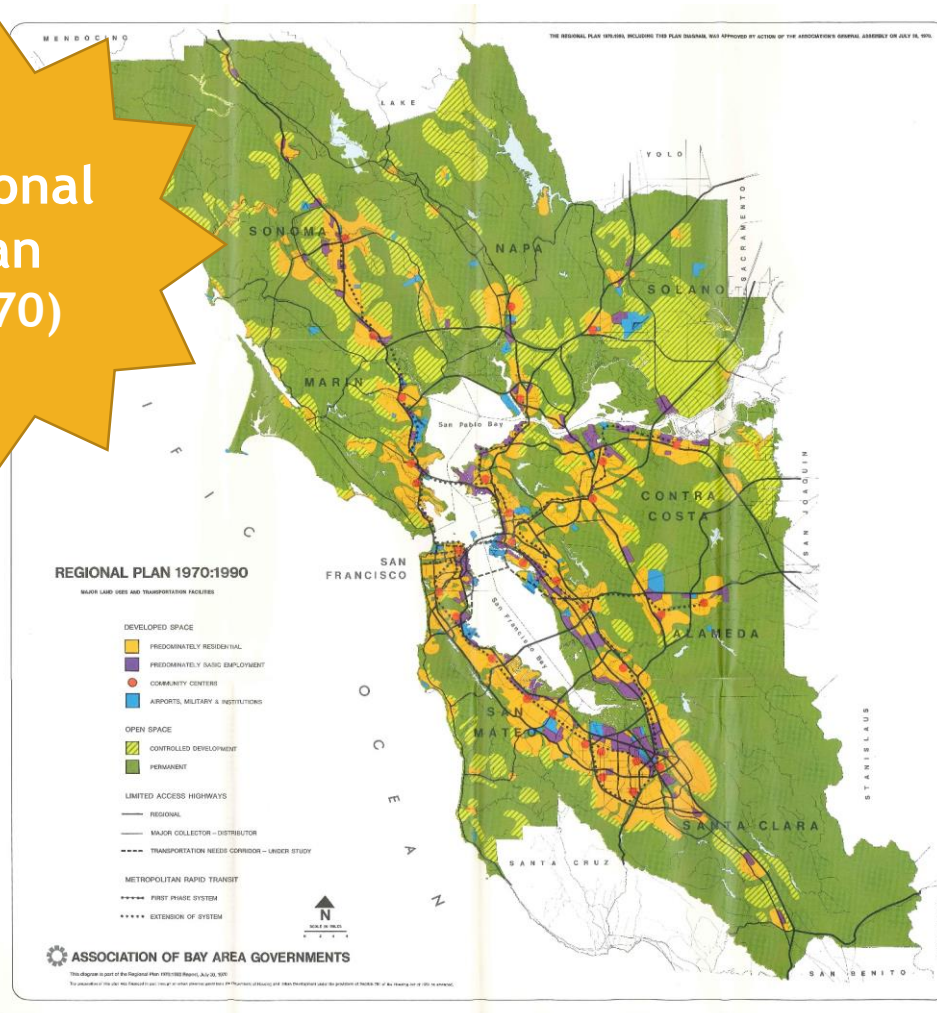
Priority Development Areas (PDAs)
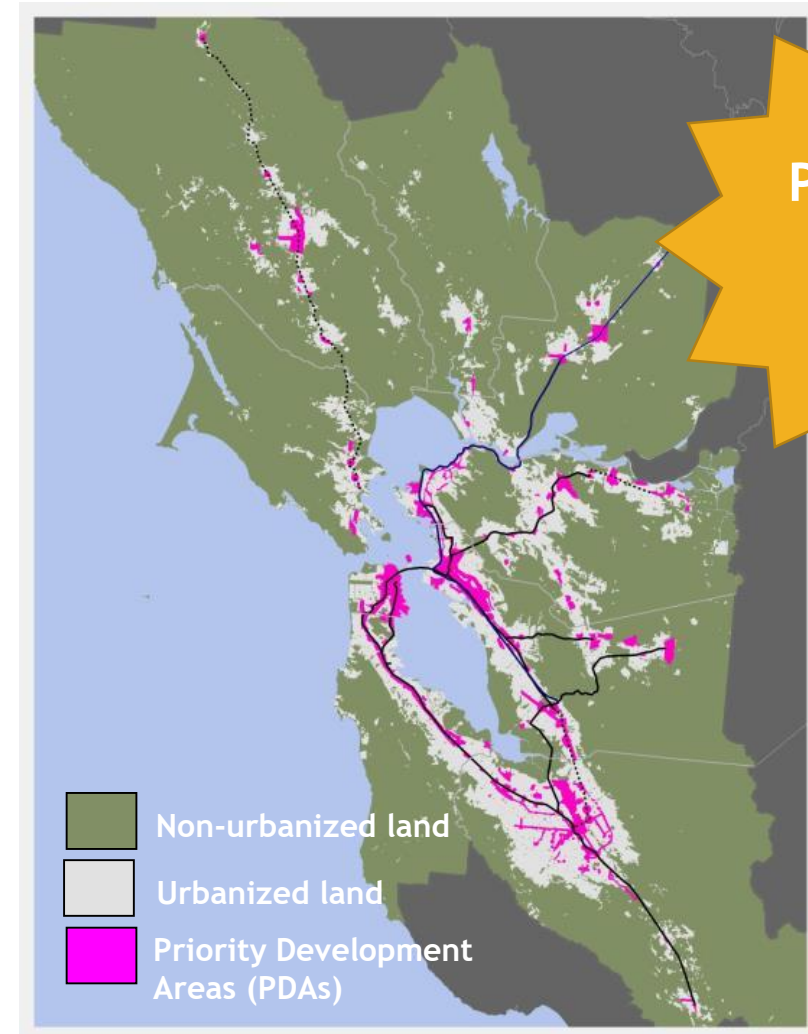
The Current Growth Framework

PDAs — Focus Housing and Jobs in **Priority Development Areas**

- Voluntarily adopted by cities; planned, or being planned, for housing
- Within walking distance of frequent transit & inside an existing community

PCAs — Protect Open Space in **Priority Conservation Areas**

- Voluntarily nominated by cities and special districts (e.g. park districts)
- Regionally significant open spaces

The Current Growth Framework

Invest in PDAs and PCAs via
One Bay Area Grant (OBAG)

OBAG devotes a share of regional transportation funds to planning and projects in PDAs and PCAs

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Successes & Challenges

- Effective open space protection
- 188 adopted PDAs

- Some PDAs not aligned with program guidelines
- Many cities do not designate transit-rich areas PDAs

- Share of housing permits in PDAs increasing
- OBAG aligns investment with growth strategy

- Current share well below PBA 2040 forecast
- Low and moderate income housing needs not met

- Stronger real estate markets in PDAs across region

- Increasing displacement pressure in many PDAs

Greenfield Development: Limited Growth

Acres of Urbanized Land by County: 2004-2014

Legend: 2004 (blue), 2014 (red)

Counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma
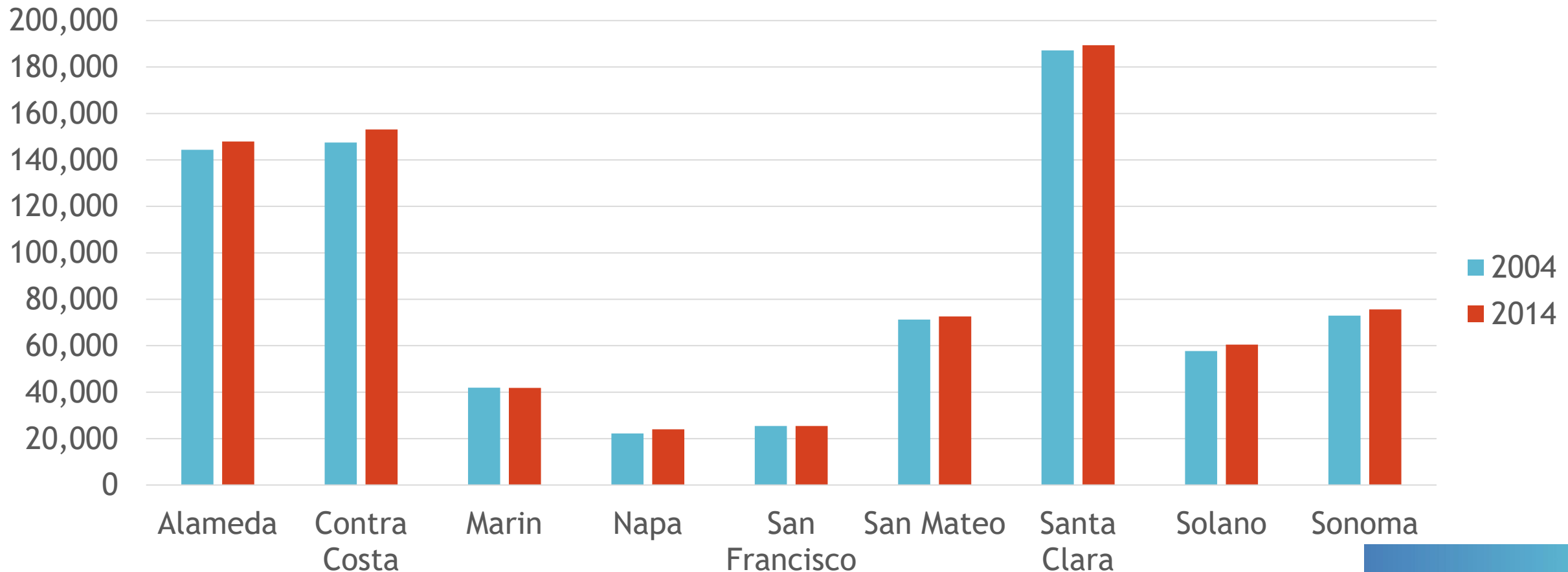
Source: Vital Signs/California Farmland Mapping and Monitoring Program

Current Framework

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Open Space: Increased Protection

Acres of Permanently Protected Open Space by County, 2002-2016

Legend: ■ 2002 ■ 2016

Counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma
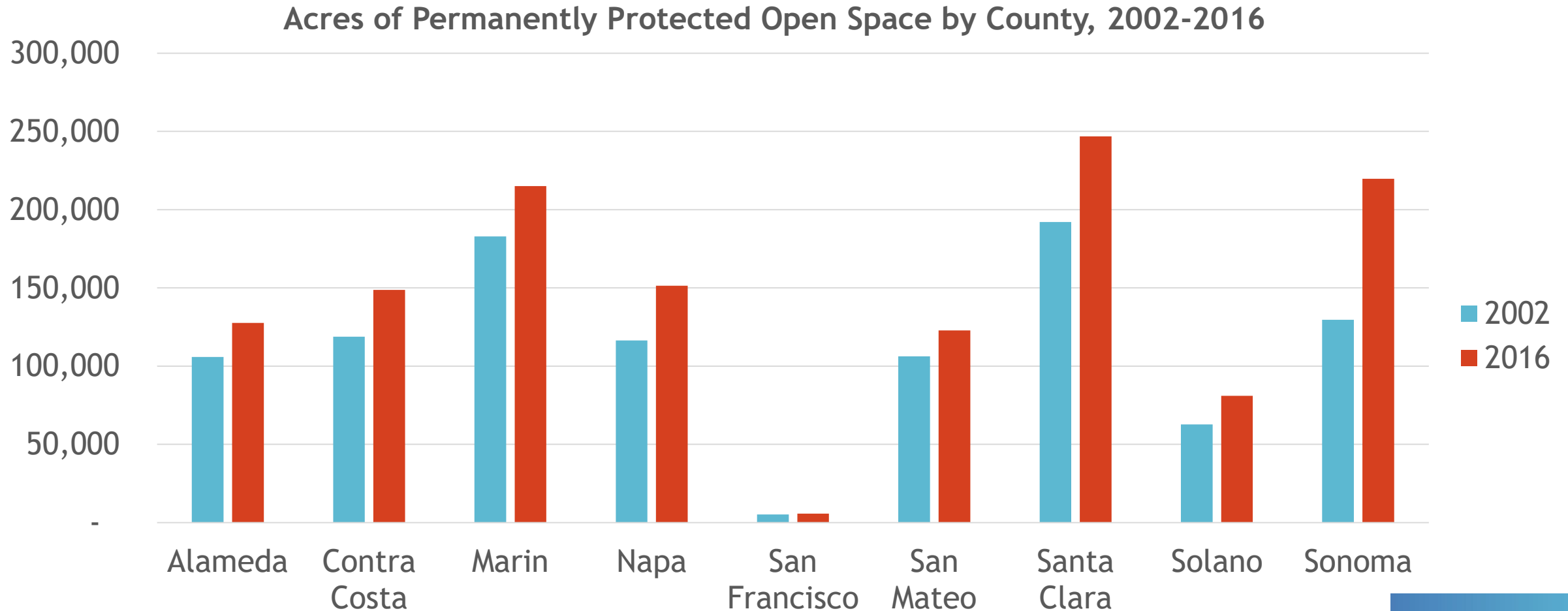
Source: California Protected Areas Database

Current Framework

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Plans Underway or Complete in 75% of PDAs

Progress Toward Plan* Adoption in PDAs, 2018

Broadway-Valdez Specific Plan
Oakland

Central Petaluma Specific Plan
Petaluma

Downtown Precise Plan
Redwood City

Chart: Number of PDAs (y-axis) vs. Level of Planning Completed (x-axis)

- None: 44
- Adopted for Part of PDA: 23
- Plan Underway: 21
- Adopted for All of PDA: 100
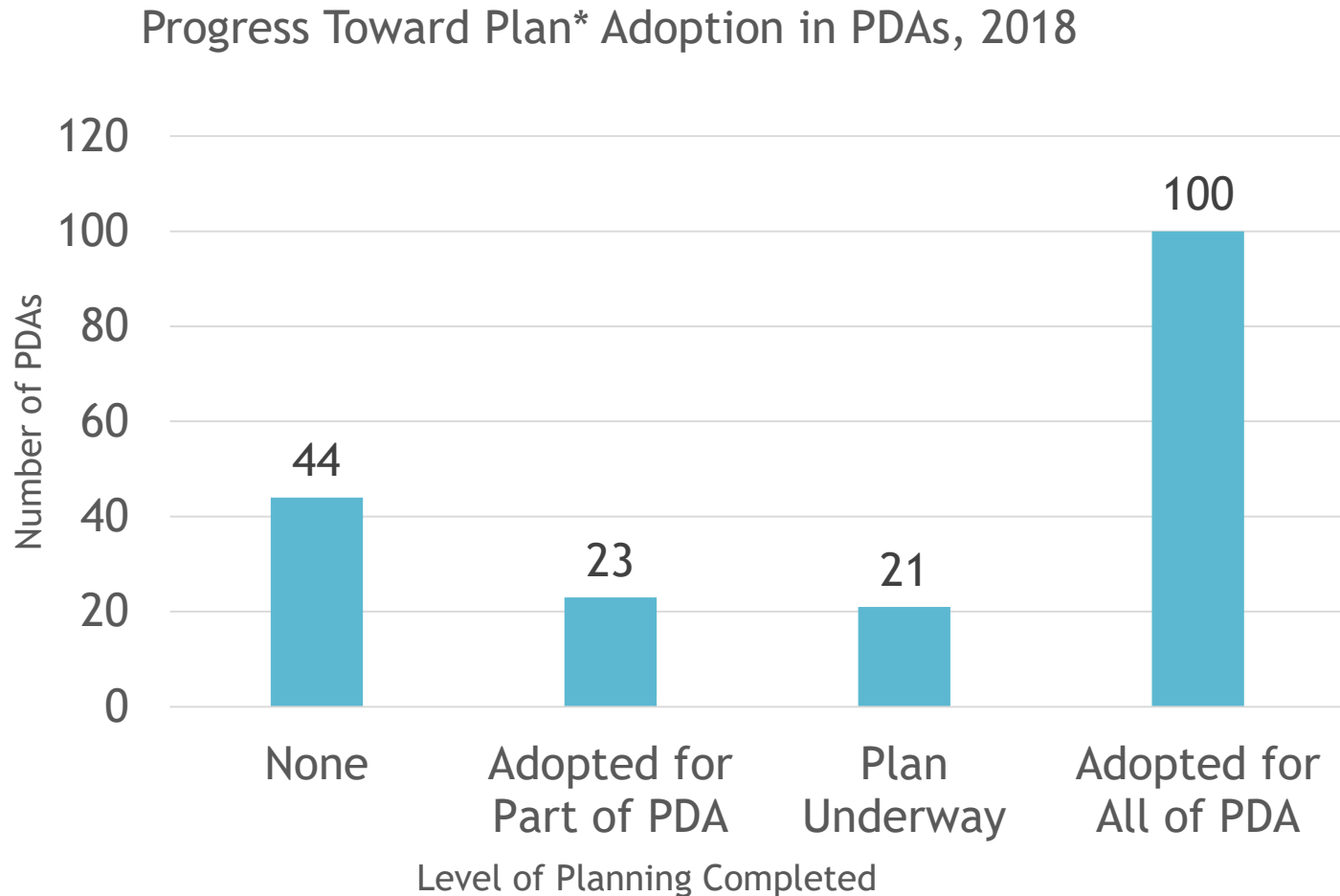
* = defined as specific plan or equivalent
Source: MTC/ABAG Survey of Locally Adopted Plans

Current Framework

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Some PDAs Do Not Meet Guidelines

Consistency with PDA Transit Guidelines

— Rail Transit

▇ Meets

▇ Does Not Meet
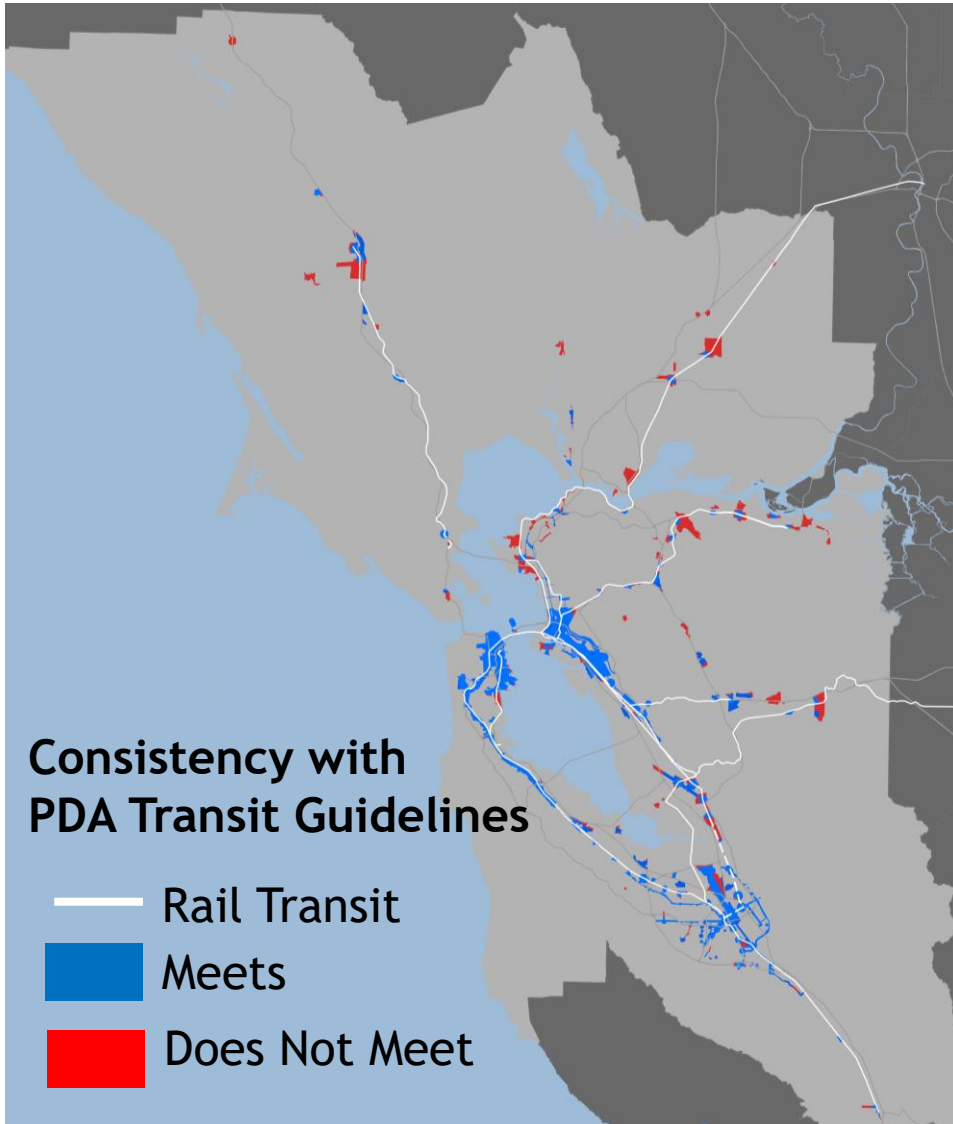
1/4

of PDAs are not well-served* by frequent transit as defined by PDA program guidelines**

*= defined as less than 50% of PDA

**= defined as a rail station, ferry terminal, or bus service with 20 minute headway at peak hours

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Many Transit-Rich Areas Are Not PDAs

>50%

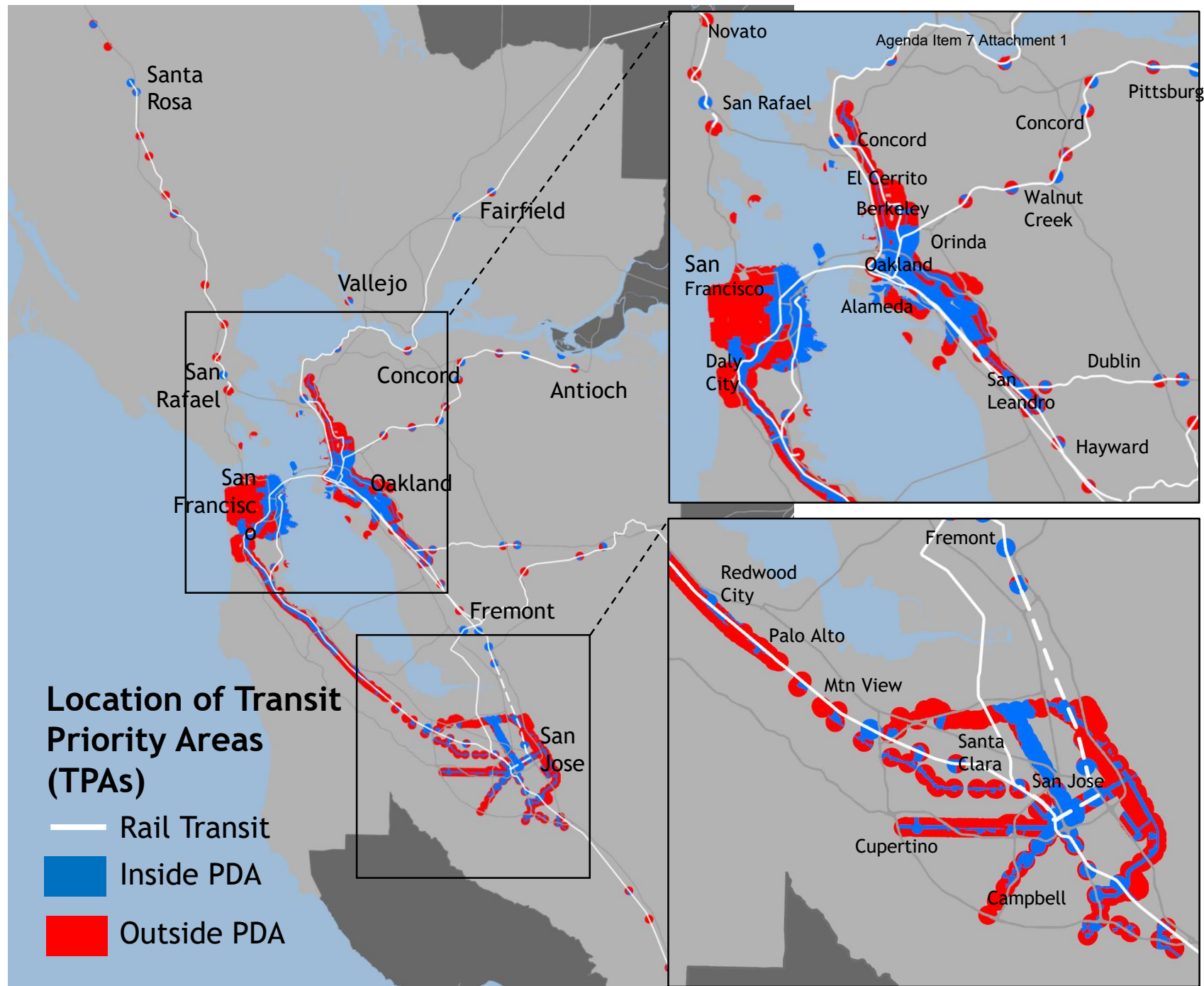of land within 10 minutes' walk of frequent transit is not designated a PDA

Source: Regional Transit Database
Current Framework

Agenda Item 7 Attachment 1

Location of Transit Priority Areas (TPAs)

— Rail Transit

■ Inside PDA

■ Outside PDA

PDA Progress on Housing Varies by **County**

Percentage of Plan Bay Area 2040 PDA Housing Targets Achieved (2014-16)

	2014-16 PDA Permits
Napa	149
San Francisco	11,883
San Mateo	3,063
Santa Clara	10,959
Alameda	7,996
Contra Costa	1,533
Solano	126
Marin	19
Sonoma	331

0%   20%   40%   60%   80%   100%   120%

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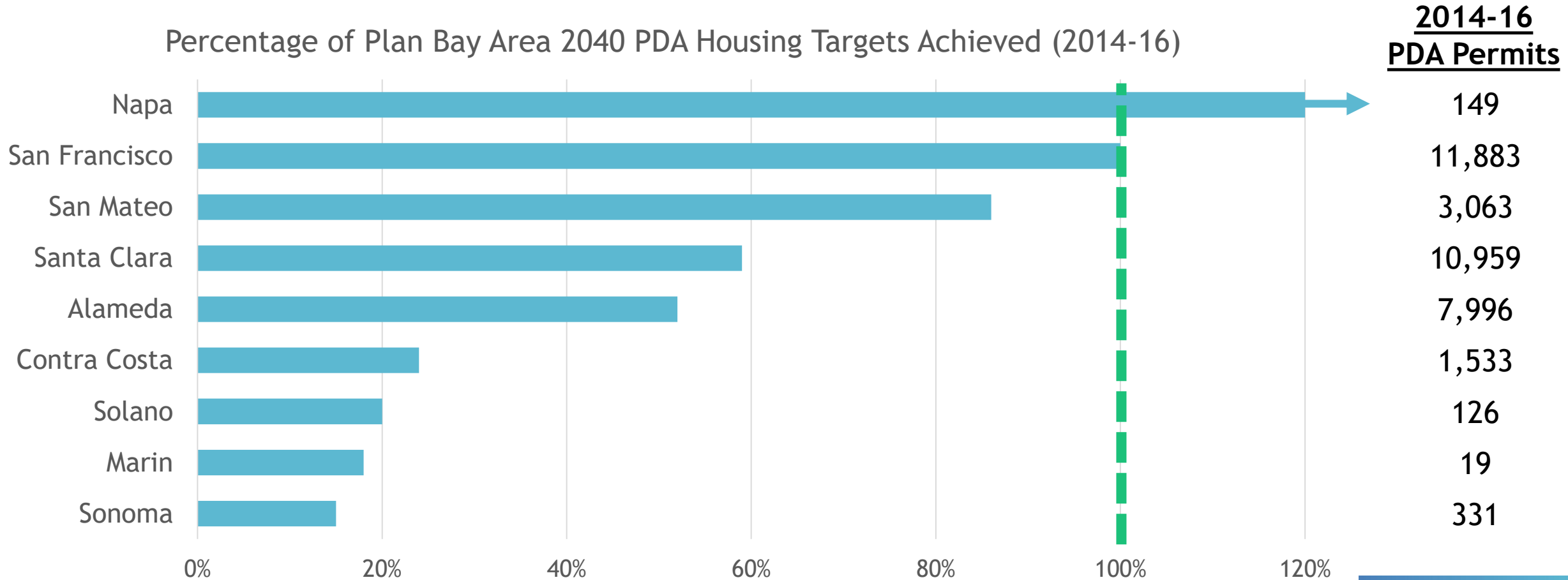
PDA Progress on Housing Varies by Transit Corridor

Percentage of Plan Bay Area 2040 Housing Targets Achieved (2014-16)
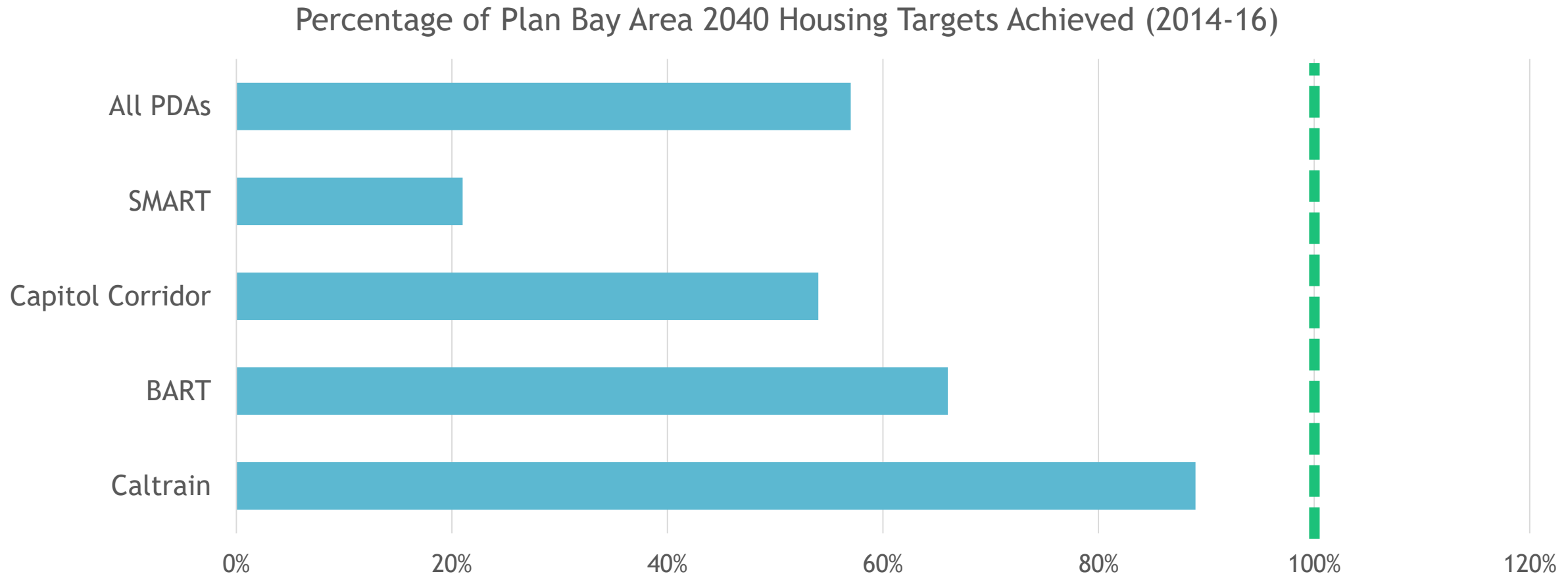
Currently Not Meeting RHNA Needs – Inside or Outside of PDAs

Housing Units Permitted by Affordability Level, 2014-2016
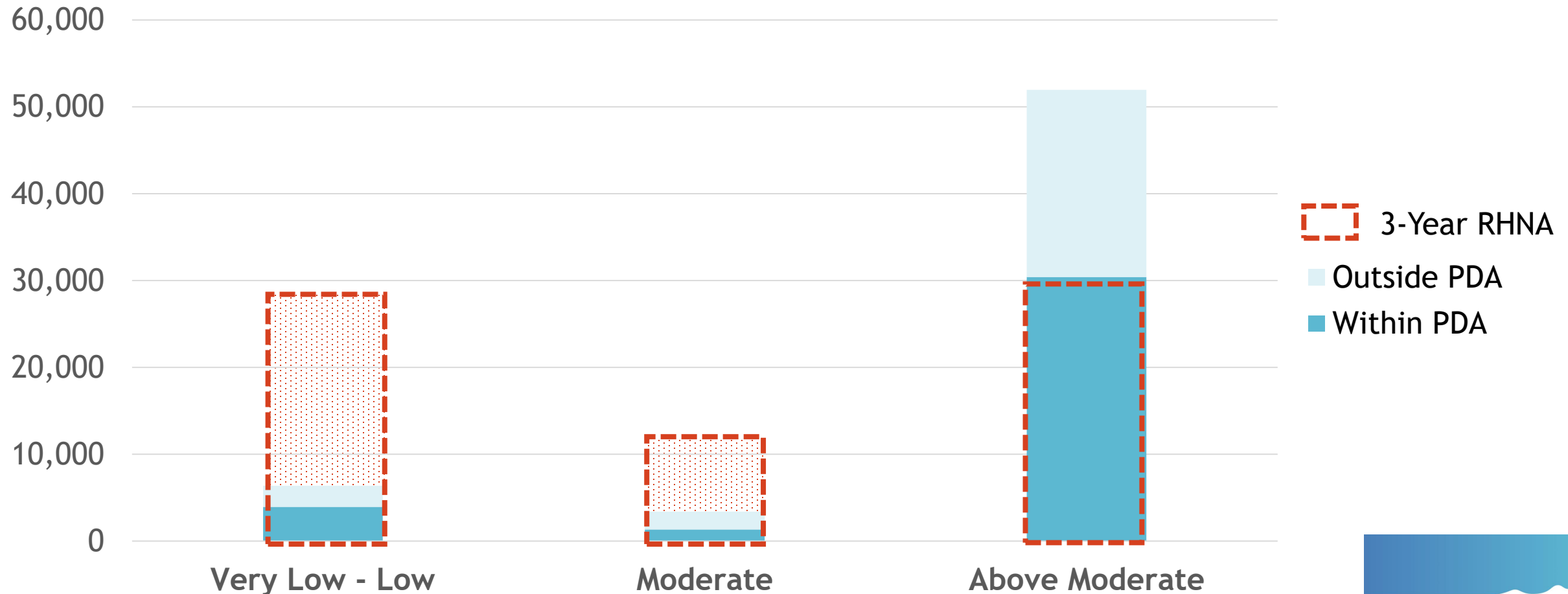
Legend:
- 3-Year RHNA
- Outside PDA
- Within PDA

Categories: Very Low - Low, Moderate, Above Moderate

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What's Missing from Our Framework?

Full Suite of Guiding Principles

AFFORDABLE

CONNECTED

DIVERSE

HEALTHY

VIBRANT

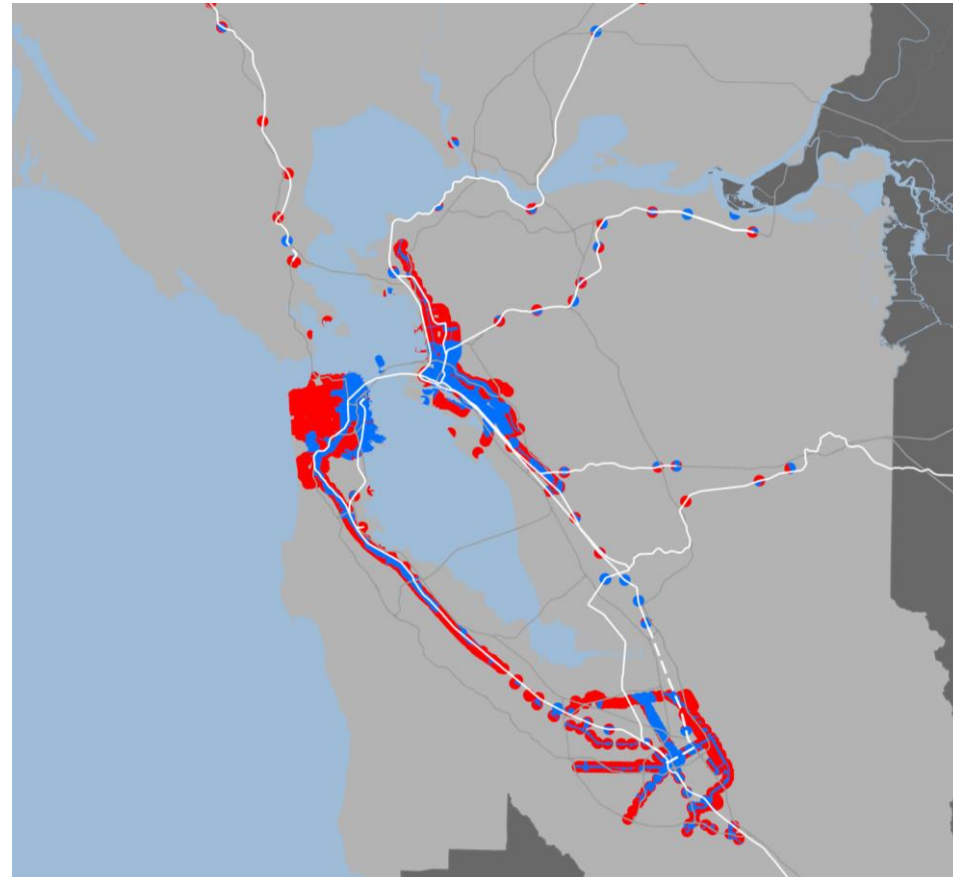## Geographies Beyond PDAs/PCAs

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Exploring Areas Best Suited for Growth

Full Suite of Guiding Principles

Housing costs

Vehicle miles traveled per person

Community stability

Hazard protection

Access to opportunity

Geographies Beyond PDAs/PCAs

Developed an index for the entire nine-county Bay Area
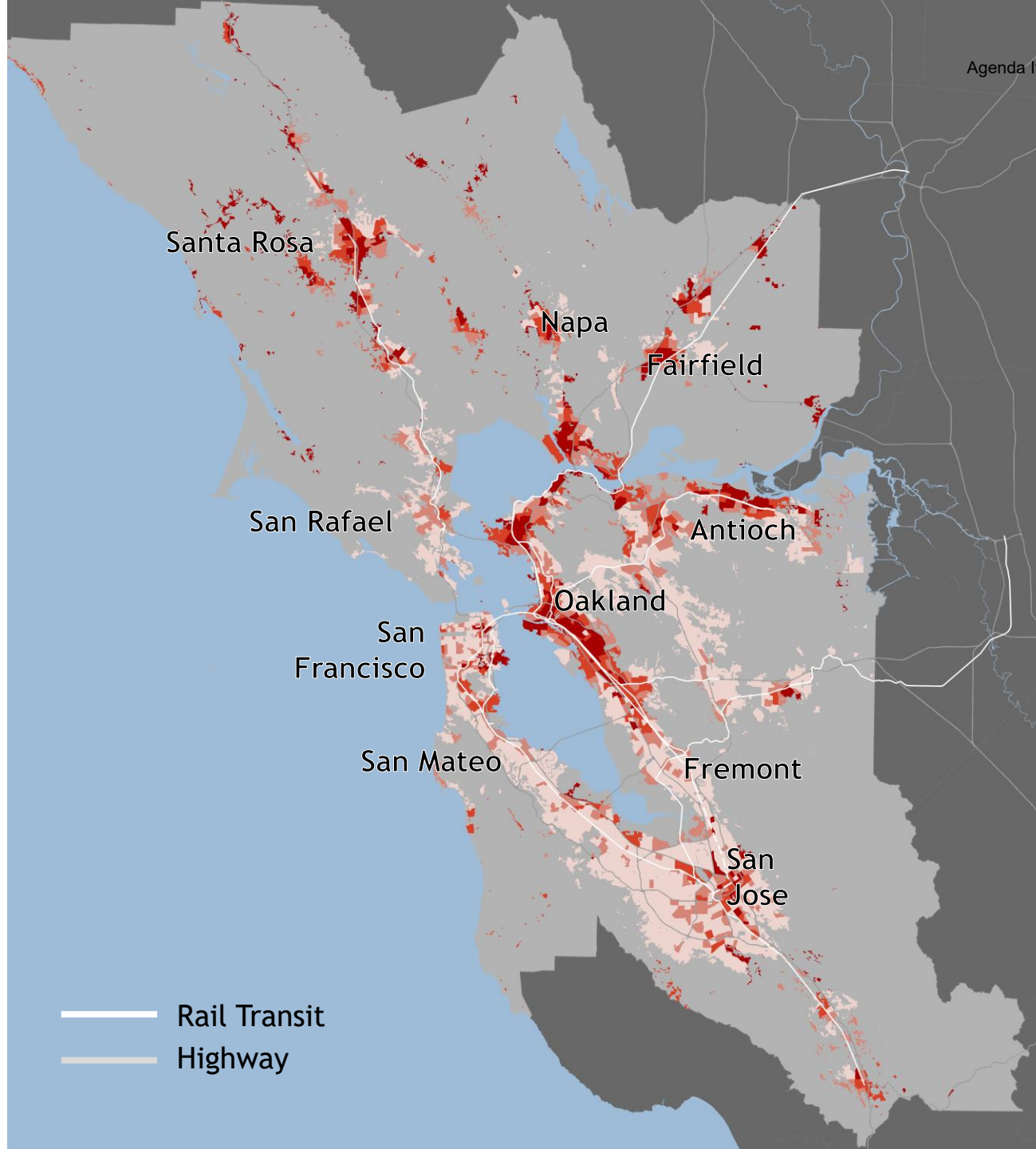
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AFFORDABLE

Housing Costs

Most affordable

5
4
3
2
1

Least affordable

Affordability Definition: Monthly Contract Rent (rent asked), 2016

Source: US Census ACS 2012-2016

Santa Rosa
Napa
Fairfield
San Rafael
Antioch
Oakland
San Francisco
San Mateo
Fremont
San Jose

—— Rail Transit
—— Highway

HORIZON

Vehicle Miles Traveled
(per person)

CONNECTED

Lowest VMT/person

Highest VMT/person

5
4
3
2
1

Santa Rosa
Napa
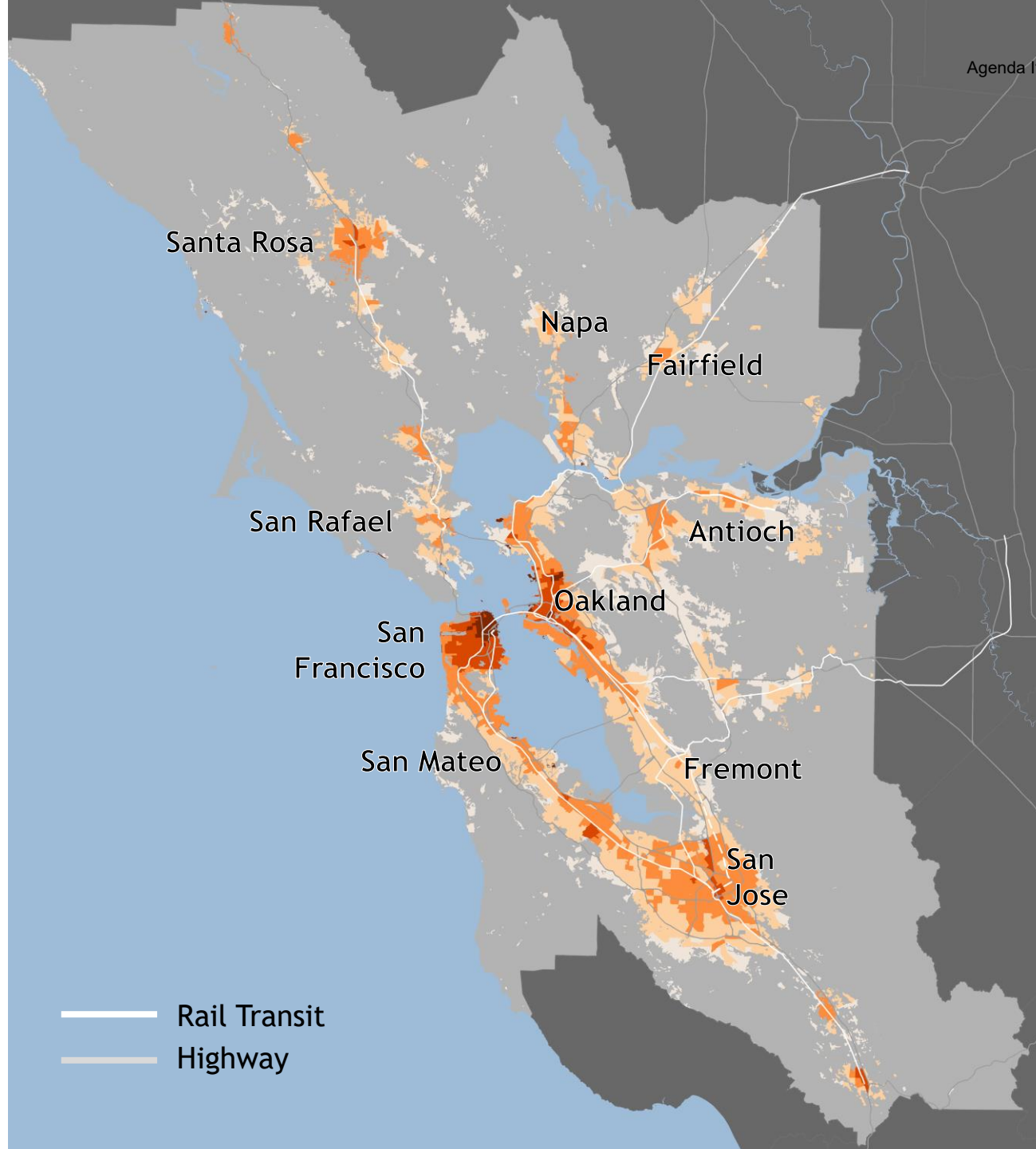Fairfield
San Rafael
Antioch
Oakland
San Francisco
San Mateo
Fremont
San Jose

Rail Transit
Highway

VMT Definition: simulated weekday vehicle miles traveled per person, 2015

Source: Travel Model One - MTC

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Community Stability

DIVERSE

Most stable: no displacement

Least stable: high displacement

5
4
3
2
1

Rail Transit
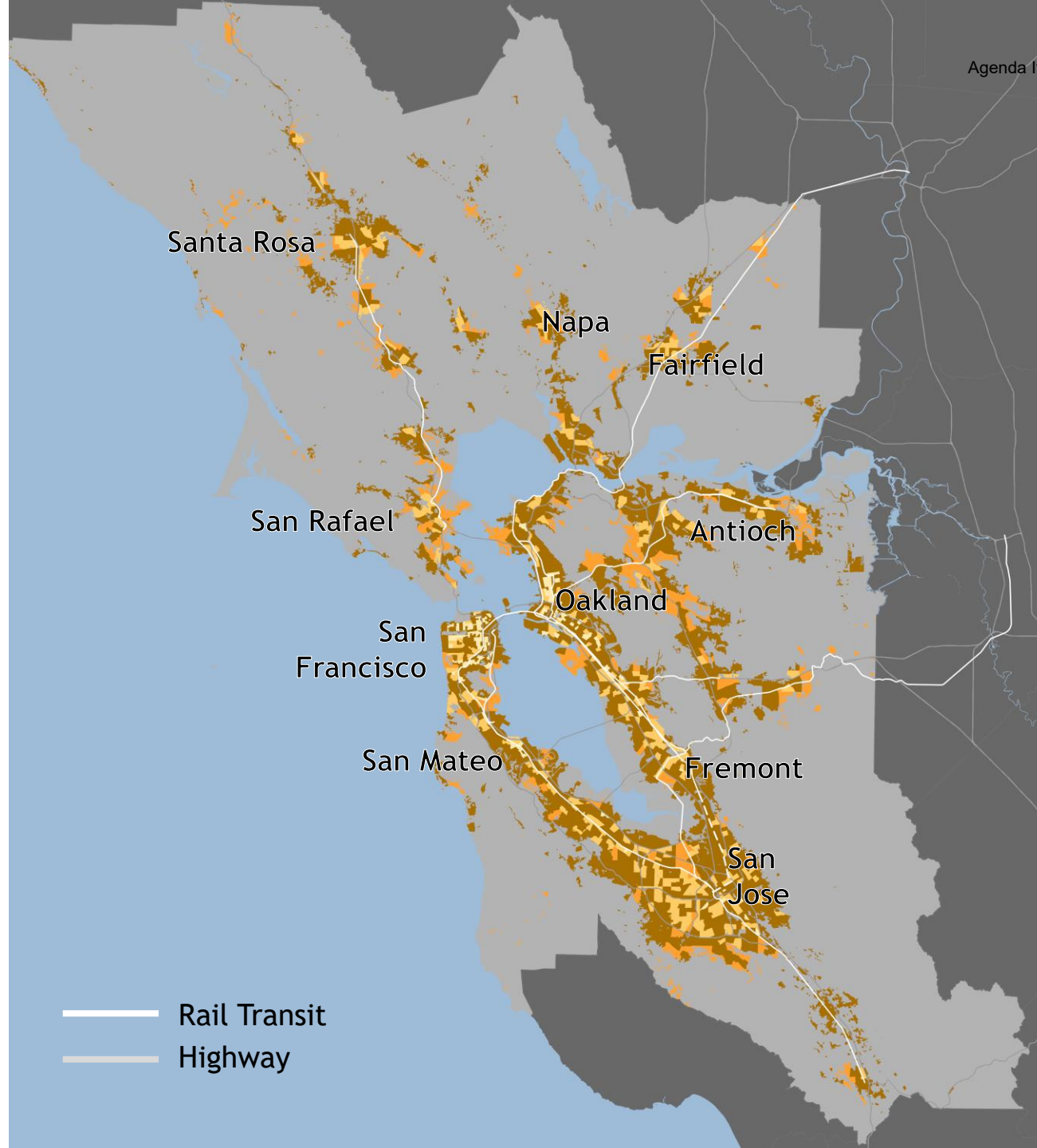Highway

Community Stability Definition: lack of displacement risk as defined in Plan Bay Area 2040/Vital Signs, 2015

Source: Vital Signs; US Census

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Hazard Protection

HEALTHY

Least vulnerable to natural hazards

5
4
3
2
1

Most vulnerable to natural hazards

Santa Rosa
Napa
Fairfield
San Rafael
Antioch
Oakland
San Francisco
San Mateo
Fremont
San Jose

—— Rail Transit
—— Highway

Protection Definition: lack of exposure to wildfire, earthquake, flooding and/or sea level rise risks

Source: MTC, Cal Fire, USGS, FEMA, BCDC

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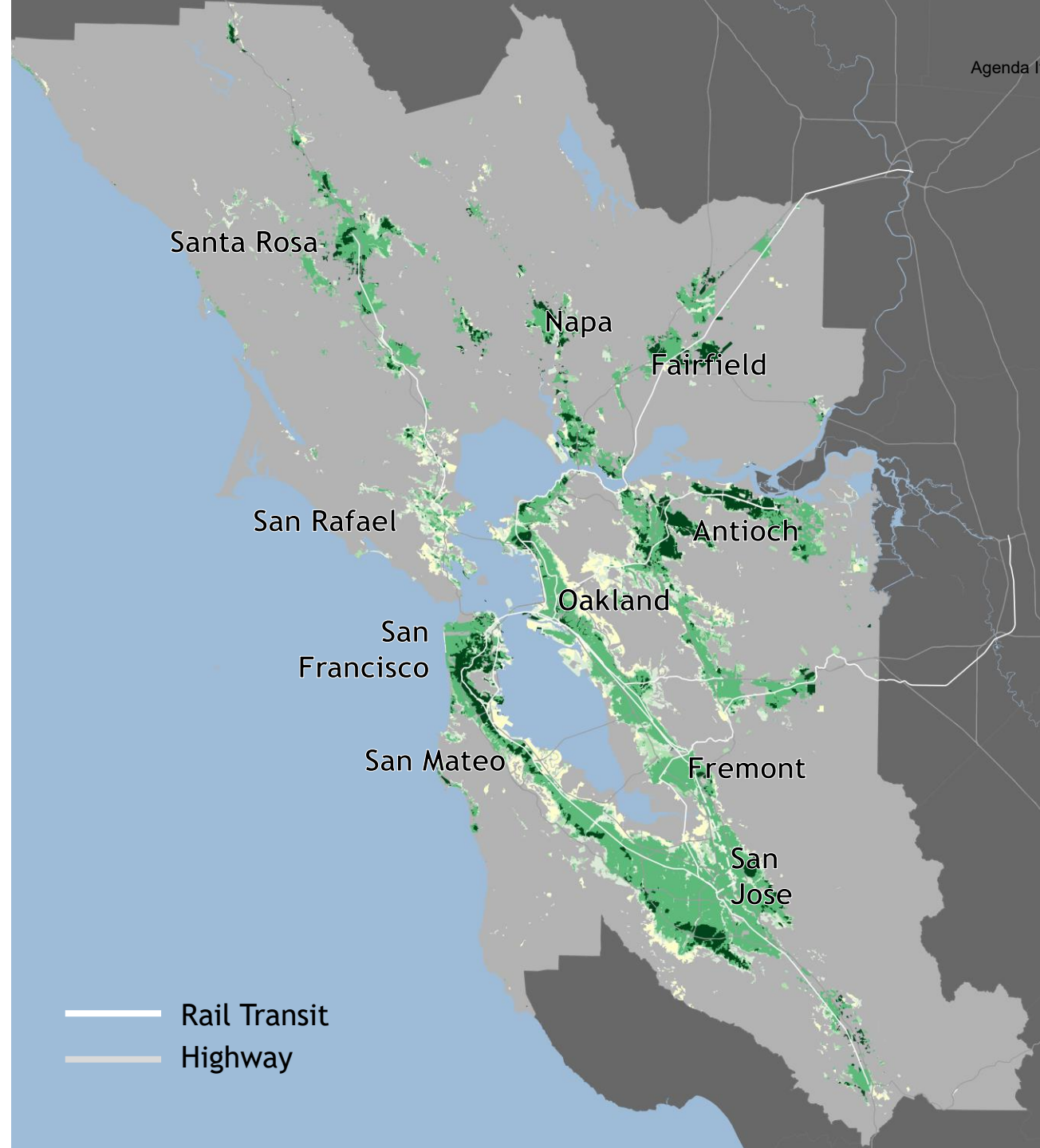
Access to Opportunity

Greatest access to healthcare, education, and jobs

Least access to healthcare, education, and jobs

5
4
3
2
1

VIBRANT

Santa Rosa

Napa

Fairfield

San Rafael

Antioch

Oakland

San Francisco

San Mateo

Fremont

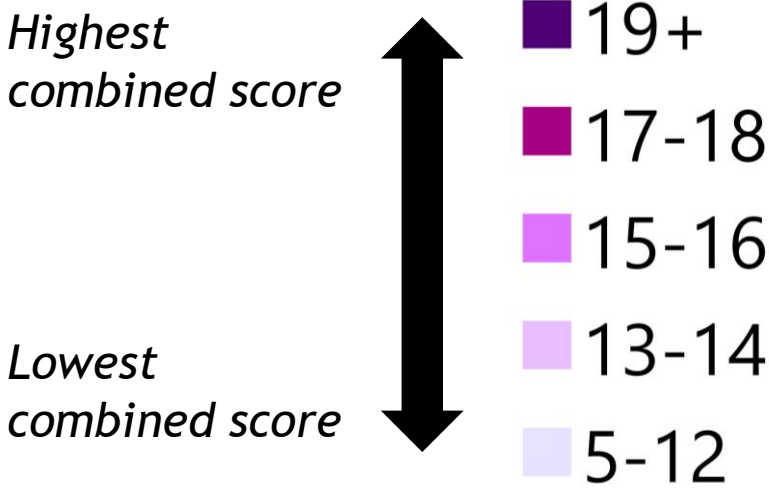San Jose

Rail Transit
Highway

Opportunity Definition: combination of access to high-quality healthcare, good schools, and diverse job opportunities

Source: California TCAC/HCD, DOE, OES; US Census ACS/LEHD

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All Indicators Combined
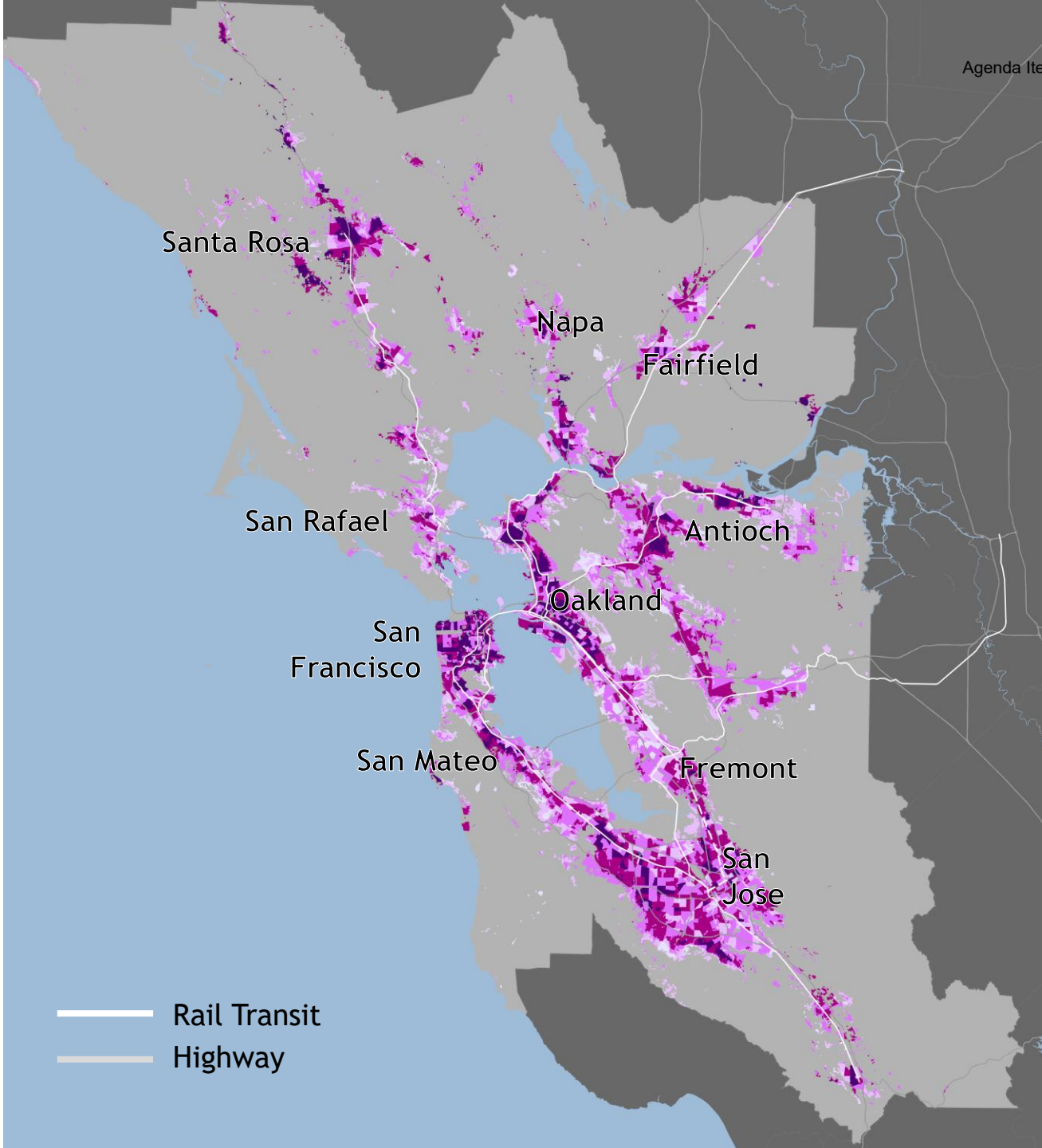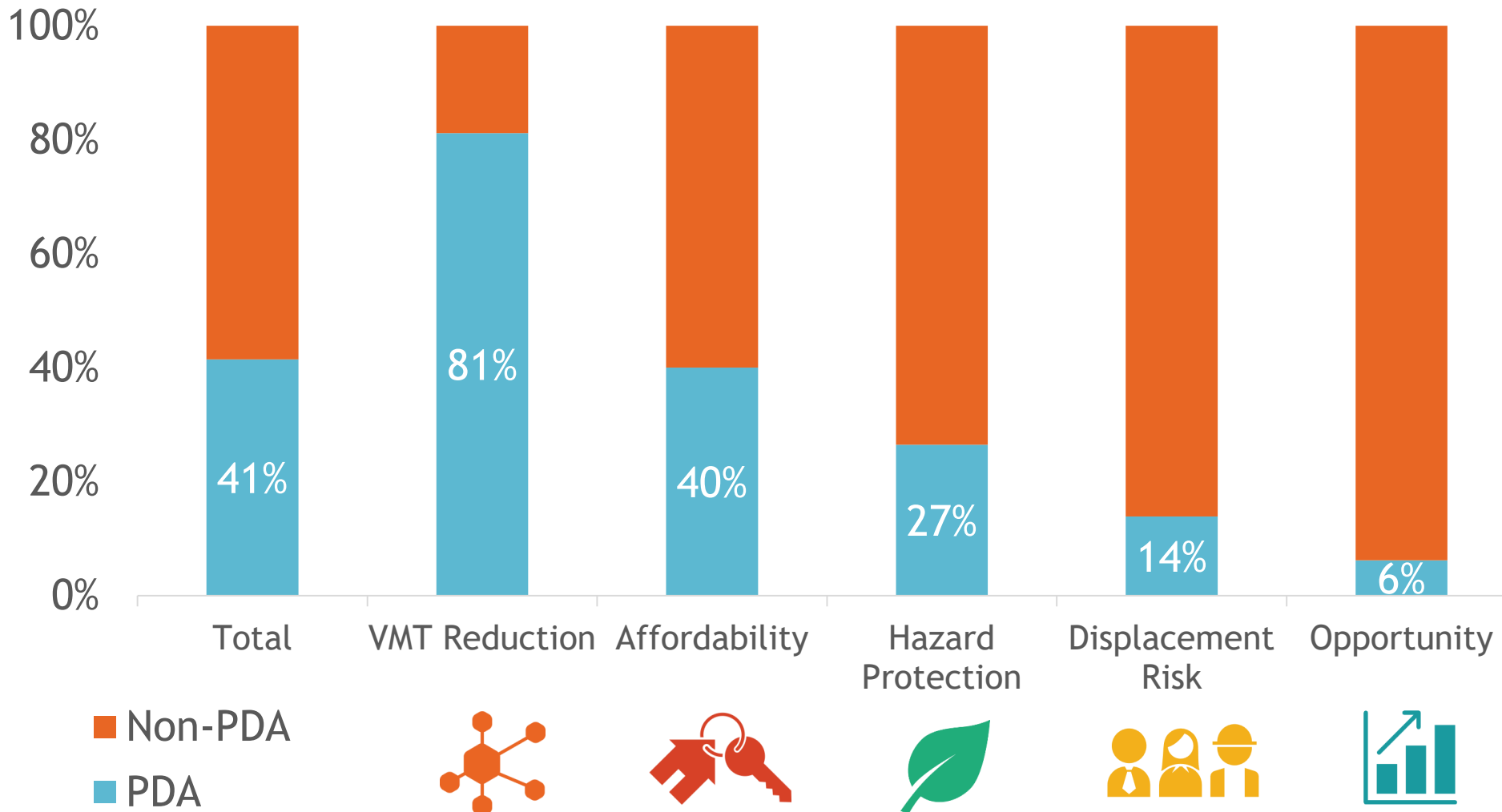
Highest combined score

Lowest combined score

19+

17–18

15–16

13–14

5–12

What's Missing?

Santa Rosa

Napa

Fairfield

San Rafael

Antioch

Oakland

San Francisco

San Mateo

Fremont

San Jose

—— Rail Transit
—— Highway

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Where Are the Highest-Ranked* Places?

PDAs are generally in lower-VMT locations with reduced transportation costs.

However, the vast majority are vulnerable to natural hazards & displacement, and nearly all lack adequate access to the Bay Area's best schools & hospitals.

* = top 20% of Census blocks in the Bay Area for each indicator

What's Missing?

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Three Potential Frameworks for Growth

A Double Down on PDAs

B PDAs Plus

C Clean Slate

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(A) Double Down on PDAs

- **Concept**
  - PDAs remain the primary focus area for housing growth & take on a larger share of job growth
  - PDAs evolve to reflect local context, including market strength and displacement risk
  - "High-performing" PDAs prioritized for the greatest levels of growth and investment

- **Example Strategies**
  - Increase share of regional funding in PDAs
  - Direct transit investments to bring all PDAs to minimum frequency requirement
  - Tailor assistance and investments to PDA market strength

PROS
- Builds on locally-supported approach
- Leverages recently-adopted plans

CONS
- Growth footprint may not be adequate to meet housing needs
- Does not fully leverage transit network

B PDAs Plus

- **Concept**
  - Expand growth geographies beyond PDAs to include TPAs served by high-capacity transit and "regional catalyst sites" for mixed-income housing
  - Expand growth framework to include entire region with supportive land use strategies as appropriate

- **Example Strategies**
  - Provide incentives and funding to support development of "catalyst sites"
  - Provide assistance and investments to spur "missing middle" and modular housing

PROS
- Leverages the full extent of the regional transit network
- Greater diversity of places to meet housing needs, including high-opportunity areas

CONS
- Requires revised guidelines and designation process

C Clean Slate

- **Concept**
  - Continue supporting growth in transit-served infill locations as part of larger strategy
  - Allow for strategic expansion of urban footprint and prioritize middle-density housing
  - Consider "new towns" to meet housing needs

- **Example Strategies**
  - Provide planning support and infrastructure for urban reserves
  - Fund first/last mile mobility solutions in lower-density locations
  - Streamline development processes

PROS
- Provides the greatest geographic footprint to meet housing needs
- Spreads responsibility for accommodating growth more broadly, including high-opportunity areas

CONS
- May require significant infrastructure investment
- Likely requires changes to urban growth boundaries

Testing Frameworks & Strategies via Futures
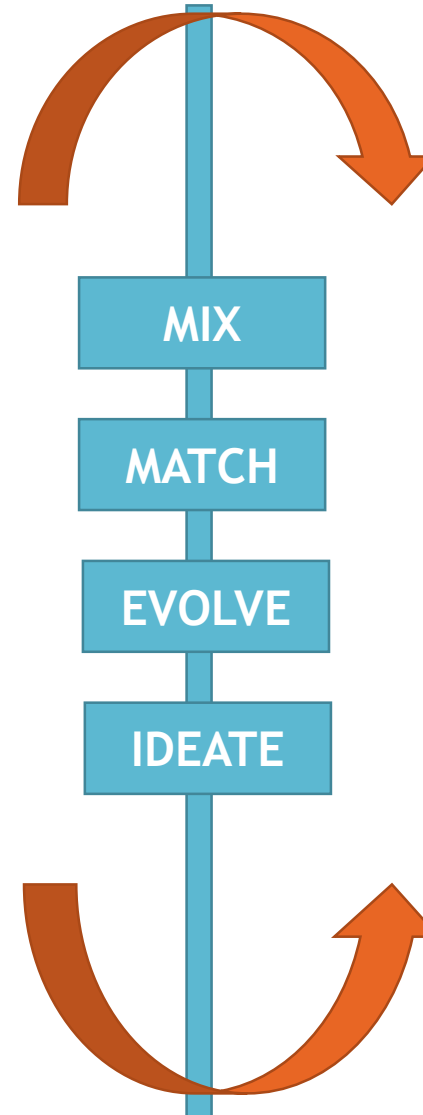

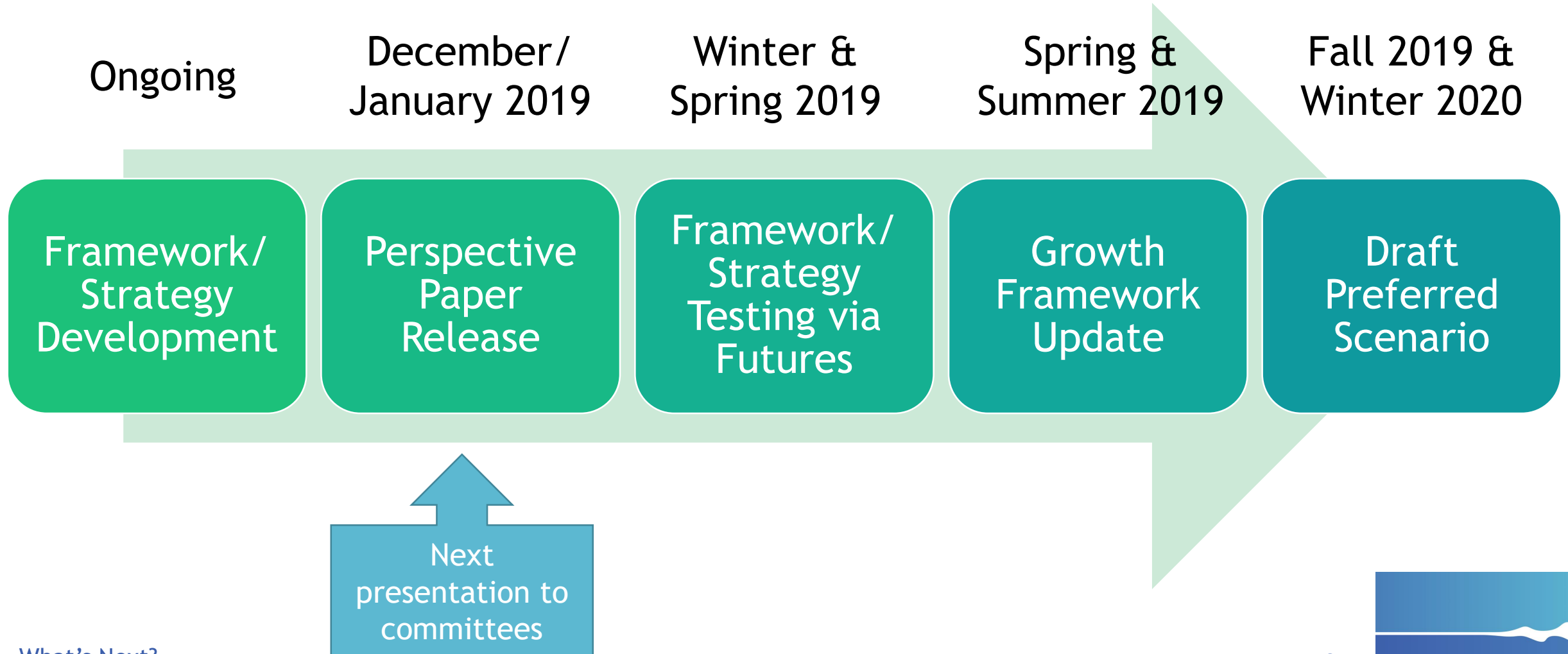**A** Double Down on PDAs

B PDAs Plus

C Clean Slate

MIX

MATCH

EVOLVE

IDEATE

Clean and Green

Rising Tides, Falling Fortunes

Back to the Future

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What's Next?

Ongoing	December/ January 2019	Winter & Spring 2019	Spring & Summer 2019	Fall 2019 & Winter 2020
Framework/ Strategy Development	Perspective Paper Release	Framework/ Strategy Testing via Futures	Growth Framework Update	Draft Preferred Scenario

Next presentation to committees

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Discussion Question #1

- Which aspects of the current PDA-focused framework are:

  - Most effective?

  - Least effective?

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Discussion Question #2

- What are the opportunities and challenges associated with:

  - Framework Option A – Double Down

  - Framework Option B – PDAs Plus

  - Framework Option C – Clean Slate

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Discussion Question #3

- Which strategies could be pursued to implement each option by:

  - Cities

  - ABAG/MTC

  - State

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