Reinventing Redevelopment: EIFDs/CRIAs

June 27th, 2017

Agenda

- Basic overview of Tax Increment Financing Districts
- Demonstration of SCAG's EIFD/CRIA Technical Assistance Application
- Demonstration of OppSites
- Overview of Metro's TOD Grant Opportunity + Transit Supportive Toolkit

State Policy Direction:
Economic Shift From an Oil-Based Economy

- Businesses across the state must continue to incorporate GHG emissions reductions strategies into business models in response to legislative mandates such as AB 32, SB 375, SB 350, and most recent **accelerations via SB 32 and AB 197**, along with federal emissions & environmental legislation.

How California Has Pursued GHG Reductions so Far

Sustainable Infrastructure Investments

Energy-Saving Industrial Processes

Renewable Energy Investments

Cap and Trade Program

Building Efficiency Design and Upgrades

CEQA Analysis Changes from VMT to # of Trips

"Economic Development 2.0" Gives Cities new Financing Tools

- **Enhanced Infrastructure Financing Districts** (**EIFDs**) (SB 628/AB 313)
- **Community Revitalization and Investment Authorities** (**CRIAs**) (AB 2/AB 2492)
- New financing tools provide the potential for cities to create specialized infrastructure districts which can ultimately fund sustainable infrastructure
- Encourage a regional approach by requiring multiple local agencies (cities, counties & special districts) to cooperate in order to use tax increment financing
- Once approved, these Districts can combine tax increment with other regional and state-authorized financing programs such as GGRF, Prop 1/84, PACE funds, etc.
  - EIFDs focus in infrastructure and public/private transactions
  - CRIAs similar with more stringent eligibility standards & focus on affordable housing

EIFDs: New Deal-Making Paradigm in CA

- Based on Infrastructure Financing District (IFD) law
- Enable tax increment financing for local/regional projects (purchase, construction, expansion, improvement, seismic retrofit, rehabilitation)
- District lifespan is 45 years to collect and spend property tax increment
- Any property with estimated useful life of 15+ years & of communitywide significance
- Managed by newly created Public Financing Authority (led by City or County) – board of 5+ members, includes at least 2 public members
- EIFD activities directed by PFA-adopted Infrastructure Financing Plan (IFP)
- No public vote required to create district
- 55% landowner or registered voter election needed for tax increment bonds
- No school district increment allowed
- Does not increase property taxes

CRIA (AB 2) Overview

Community Revitalization Investment Authority (CRIA)- effective January 2015

- Restores redevelopment authorities to disadvantaged communities
  - Carries out provisions of Community Redevelopment Law
- Formed by City or County (Special Districts allowed if CRIA is Joint Powers Authority) – 5+ member board, including at least 2 public members
- Can fund projects for economic revitalization in disadvantaged communities
- Allows projects to be financed by bonds serviced by tax increment
  - 30 years to issue debt; 45 years to repay indebtedness
- Powers of eminent domain granted to CRIAs for first 12 years of district
- No voter approval for formation or bond issuance, but subject to majority protest at adoption and every 10 years
- **25% affordable housing set-aside**
- **Must meet qualification requirements**

CRIA Eligibility / Qualification

- **Qualifying Conditions of a Community Revitalization Area:**
  - **80% of land (calculated by census tracts or block groups) must have median household income less than 80% of statewide / countywide / citywide median**
  - **Must exhibit at least three of the following conditions:**
    1. Non-seasonal unemployment rate 3 percentage points higher than statewide median
    2. Crime rates are 5% higher than statewide median
    3. Deteriorated or inadequate infrastructure
    4. Deteriorated commercial or residential structures

  - **Note:** AB 2492 (NEW) ability to qualify under CalEPA designation as disadvantaged community (based on geographic, socioeconomic, public health, environmental factors)
  - Like EIFD, agency must have Finding of Completion from DOF and comply with all orders from Controller

Types of Projects EIFDs & CRIAs Can Fund

Industrial Structures

Aff. Housing / Mixed Use

Transit Priority Projects

Wastewater/Groundwater

Light / High Speed Rail

Civic Infrastructure

Parks & Open Space

Childcare Facilities

Brownfield Remediation

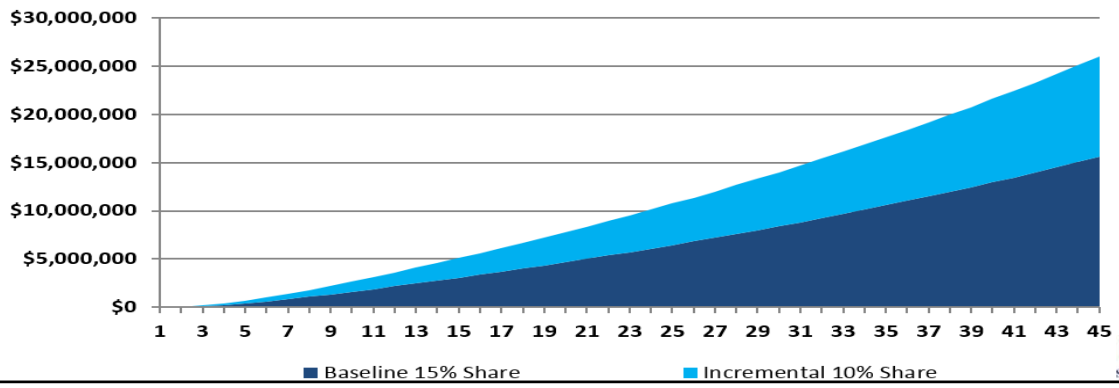
EIFDs & CRIAs – Diverse Funding Approach

- Can use multiple funding sources with tax increment:
- Potential to apply State funding sources:
  - Proposition 1 bond funds
  - Cap-and-trade proceeds
- Federal & State Grants
  - Greenhouse Gas Reduction Funds
  - Federal DOT/EPA/DOE funding programs
- Other Potential Funding Sources:
  - Property tax revenue including RPTTF
  - Vehicle license fee (VLF) prop. tax backfill increment
  - Development agreement / impact fees
  - City / county / special district loans
  - Benefit assessments (e.g. contribution from CFD)
  - Private investment

Cooperative Districts = Greater Funding Capacity

- **Example:** $150 million project (today's dollars) developed over 10 years
- **Scenario 1:** EIFD with **15 total cents** of property tax capture
- **Scenario 2:** EIFD with **25 total cents** of property tax capture
- In this scenario, the EIFD's cumulative property tax revenues accelerate from approximately **$15.6 million** to **$26.0 million** over 45 years

45-Year Cumulative Property Tax Increment With 15 Cent Share versus 25 Cent Share



Thank You / Questions?

Kosmont Companies
1230 Rosecrans, Suite 630
Manhattan Beach, CA 90266
Telephone: (424) 297-1070
www.kosmont.com

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SCAG Objective and Screening Criteria

SCAG Objective: Provide member cities with initial screening to determine whether a sustainable infrastructure project could utilize EIFD or CRIA for funding / financing

Primary Screening Criteria and Sample Required Data:

Screening Criteria	Sample Required Data	Relevant SCAG Resources
1. EIFD/CRIA Successor Agency Prerequisites	• Receipt of Finding of Completion from DOF	• N/A (DOF website)
2. Economic Development Potential	• Planned projects • Existing parcel values	• GIS land use data • Parcel data by County
3. Current Zoning and Density in Project Area	• Existing zoning / specific plan boundaries	• GIS data, incl. general / specific plans, existing land use
4. Project Location and Infrastructure Needs	• Location in High-Quality Transit / Transit Priority Area	• GIS data, HQTA / TPP / TPA maps
5. Potential Infrastructure Financing Solutions	• Property tax capture rate • Eligibility for grant funding	• Property tax data (in process) • GIS data, TPA, Disadv. Comm. maps
6. CRIA Eligibility	• Income / crime / unemp. • Disadv. Comm. designation	• Socioeconomic data • GIS data, incl. Disadv. Comm. maps
7. Technical Screening	• Former RDA project areas • Existing ROPS obligations	• N/A (City finance departments)

Example Required Data: Property Tax Increment Capture

SCAG Cities' Share of Property Tax Increment by County

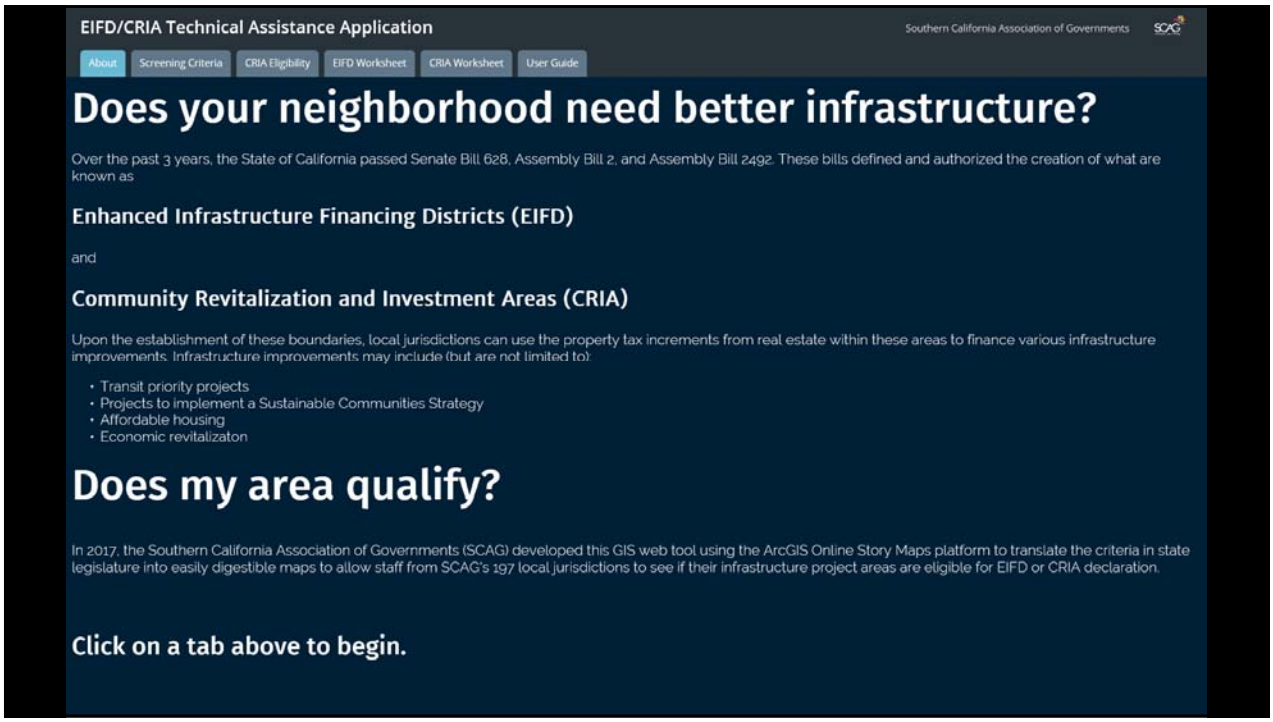
Amount of Increment Captured (per $1)	LA	Orange	San Bernardino	Riverside	Ventura	Imperial
25 Cents+	1	1	3	2	0	6
20 to 25 Cents	7	0	4	3	1	0
15 to 20 Cents	10	11	9	7	3	1
10 to 15 Cents	23	14	5	8	3	0
5 to 10 Cents	47	4	1	8	3	0
< 5 Cents	0	4	2	0	0	0
Total	**88**	**34**	**24**	**28**	**10**	**7**

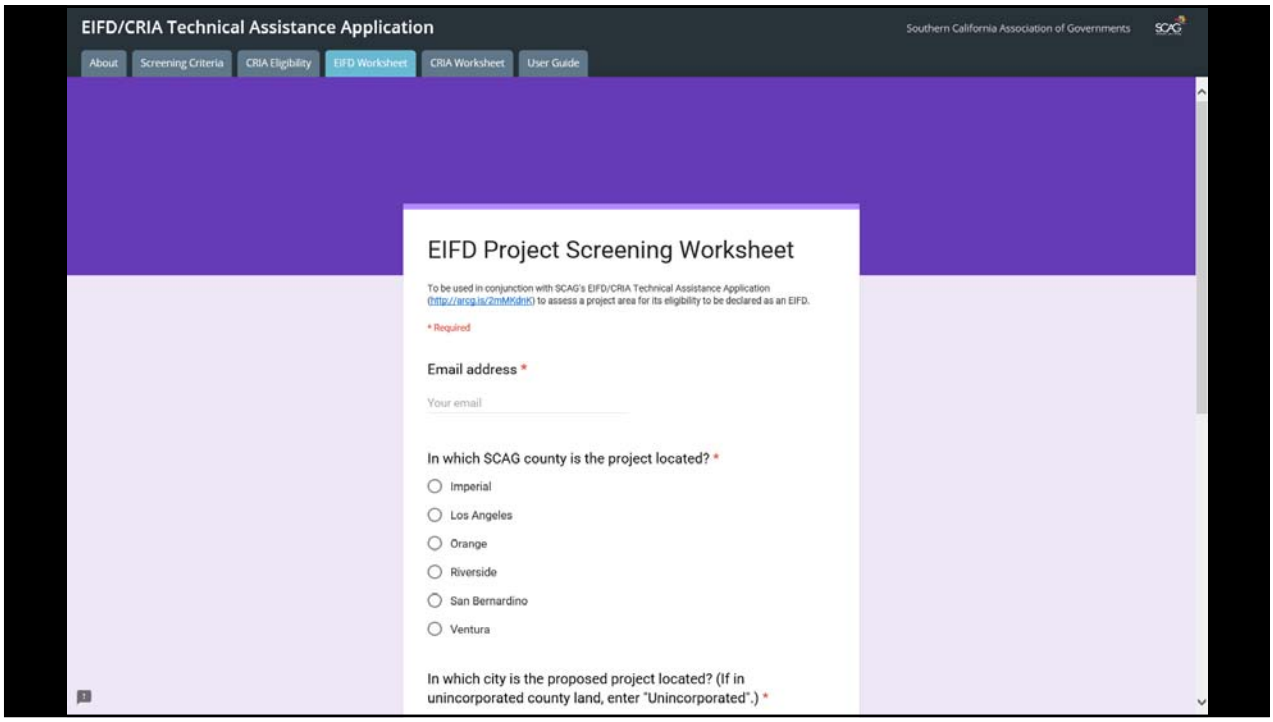
- **69 cities capture 15 cents or higher**: Generally able to form district on their own
- **122 cities capture less than 15 cents**: May have to find partners or supplemental funds

Source: HdL Companies.

[SCAG EIFD/CRIA Technical Assistance Application]

http://arcg.is/2mMKdnK

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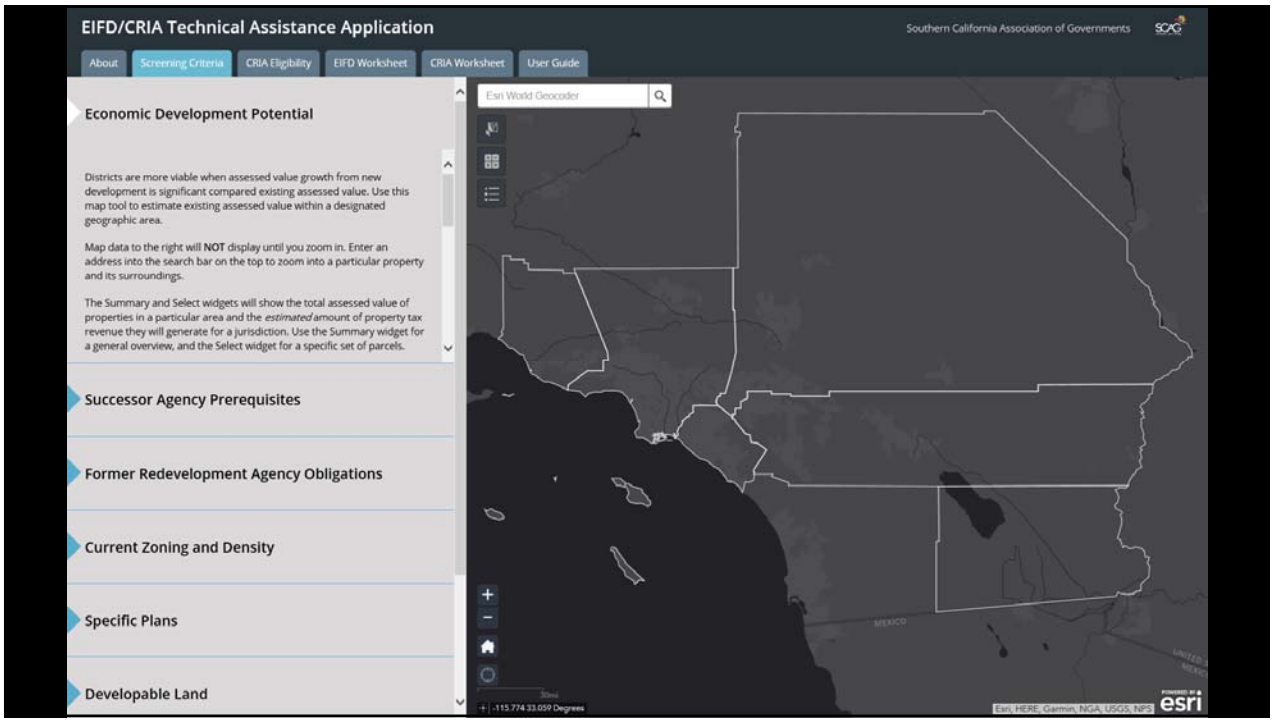
EIFD Project Screening Worksheet
To be used in conjunction with SCAG's EIFD/CRIA Technical Assistance Application (http://arcg.is/2mMKdnK) to assess a project area for its eligibility to be declared as an EIFD.
* Required
Email address *
Your email
In which SCAG county is the project located? *
Imperial
Los Angeles
Orange
Riverside
San Bernardino
Ventura
In which city is the proposed project located? (If in unincorporated county land, enter "Unincorporated".) *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The Summary and Select widgets will show the total assessed value of properties in a particular area and the estimated amount of property tax revenue they will generate for a jurisdiction. Use the Summary widget for a general overview, and the Select widget for a specific set of parcels.
Successor Agency Prerequisites
Former Redevelopment Agency Obligations
Current Zoning and Density
Specific Plans
Developable Land
Esri World Geocoder
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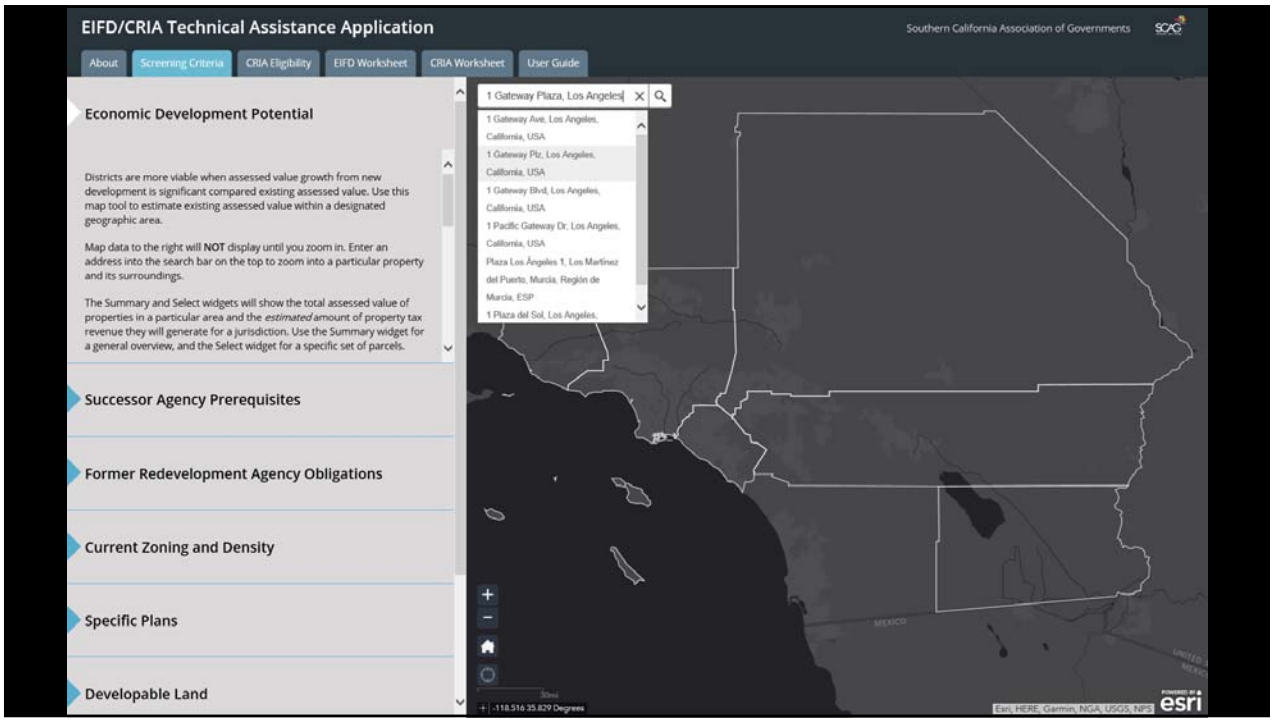
-115.774 33.059 Degrees
Esri, HERE, Garmin, NGA, USGS, NPS
esri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Successor Agency Prerequisites
Former Redevelopment Agency Obligations
Current Zoning and Density
Specific Plans
Developable Land
1 Gateway Plaza, Los Angeles
1 Gateway Ave, Los Angeles, California, USA
1 Gateway Plz, Los Angeles, California, USA
1 Gateway Blvd, Los Angeles, California, USA
1 Pacific Gateway Dr, Los Angeles, California, USA
Plaza Los Ángeles 1, Los Martínez del Puerto, Murcia, Región de Murcia, ESP
1 Plaza del Sol, Los Angeles,
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Esri, HERE, Garmin, NGA, USGS, NPS
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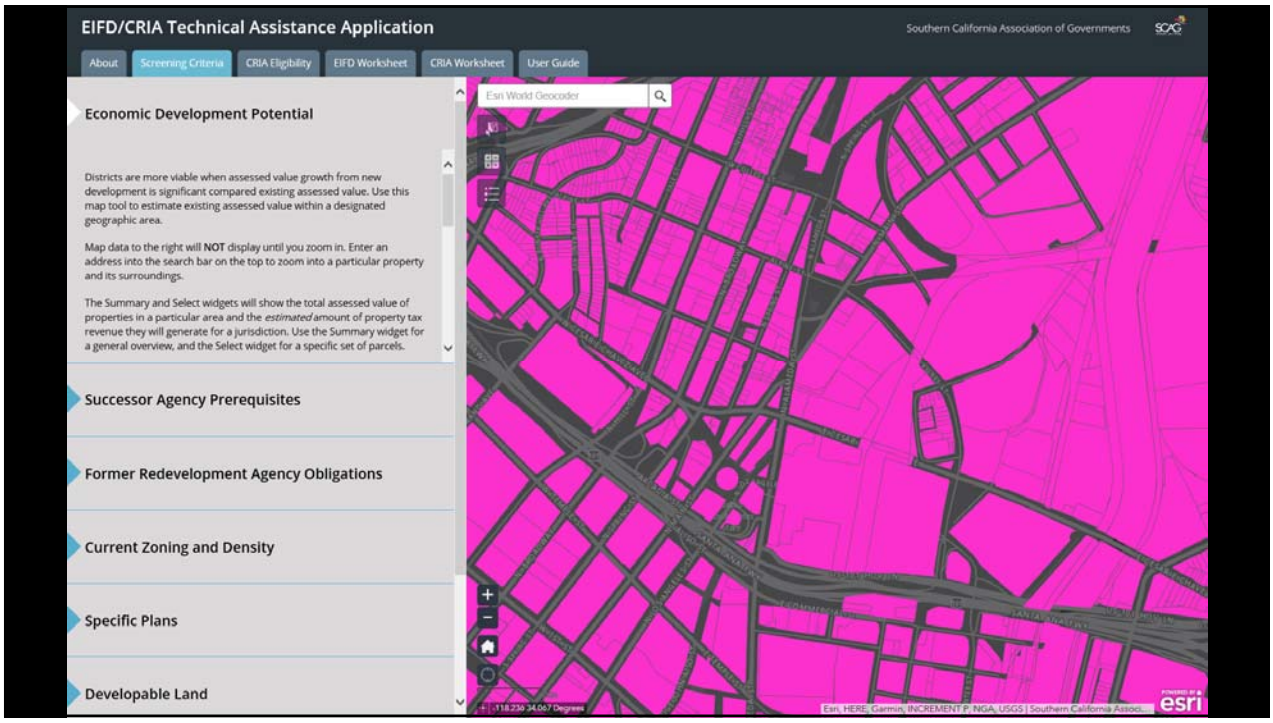
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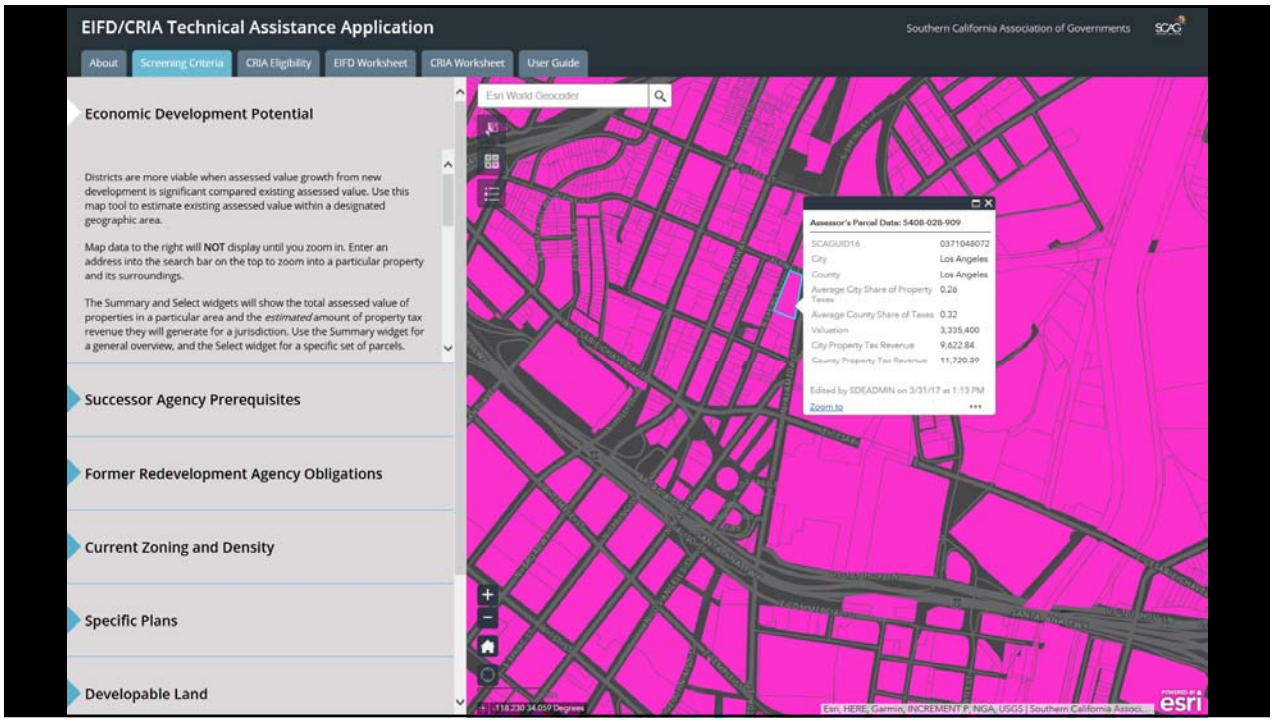
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Former Redevelopment Agency Obligations
Current Zoning and Density
Specific Plans
Developable Land
Esri World Geocoder
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SCAGUID16 0371048072
City Los Angeles
County Los Angeles
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City Property Tax Revenue 9,622.84
County Property Tax Revenue 11,720.39
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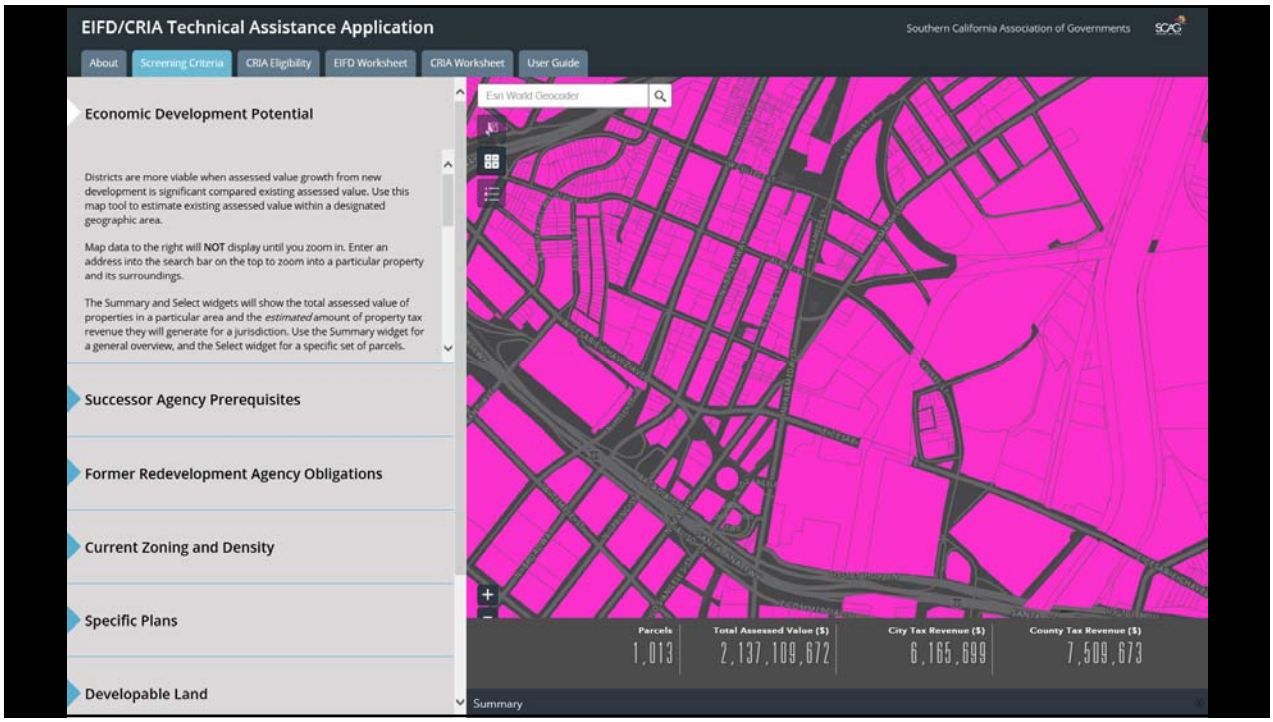
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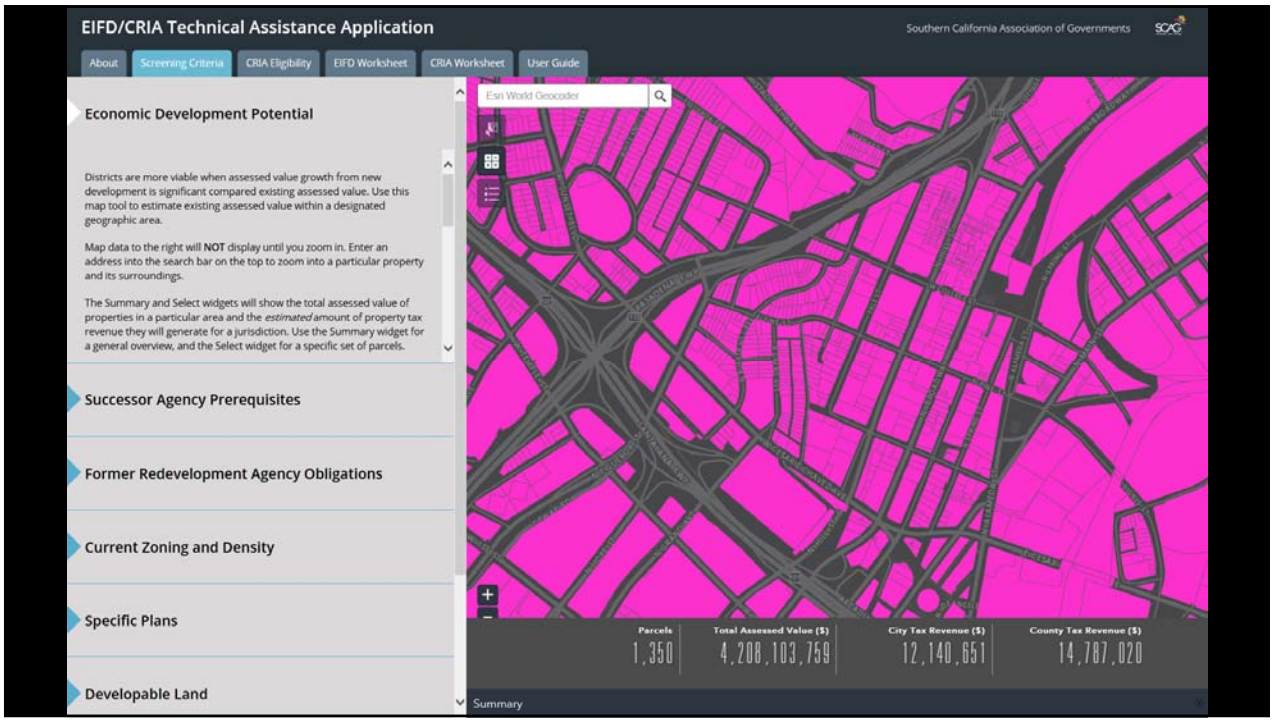
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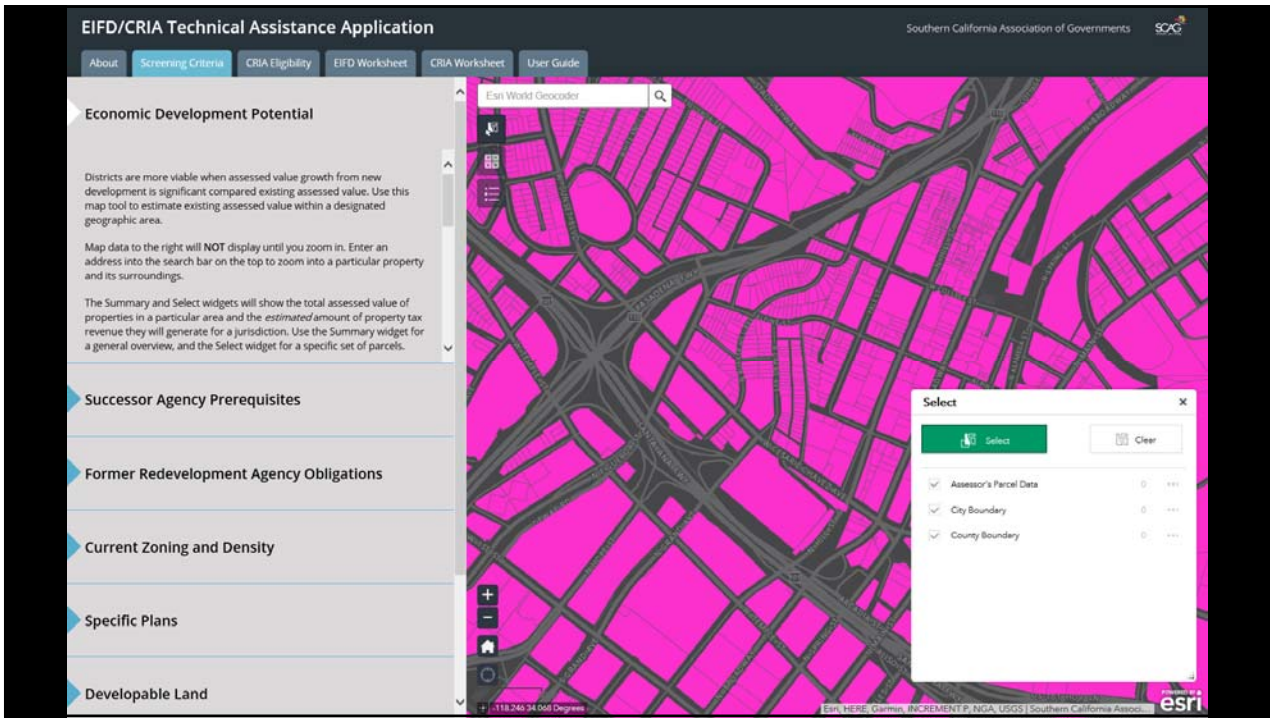
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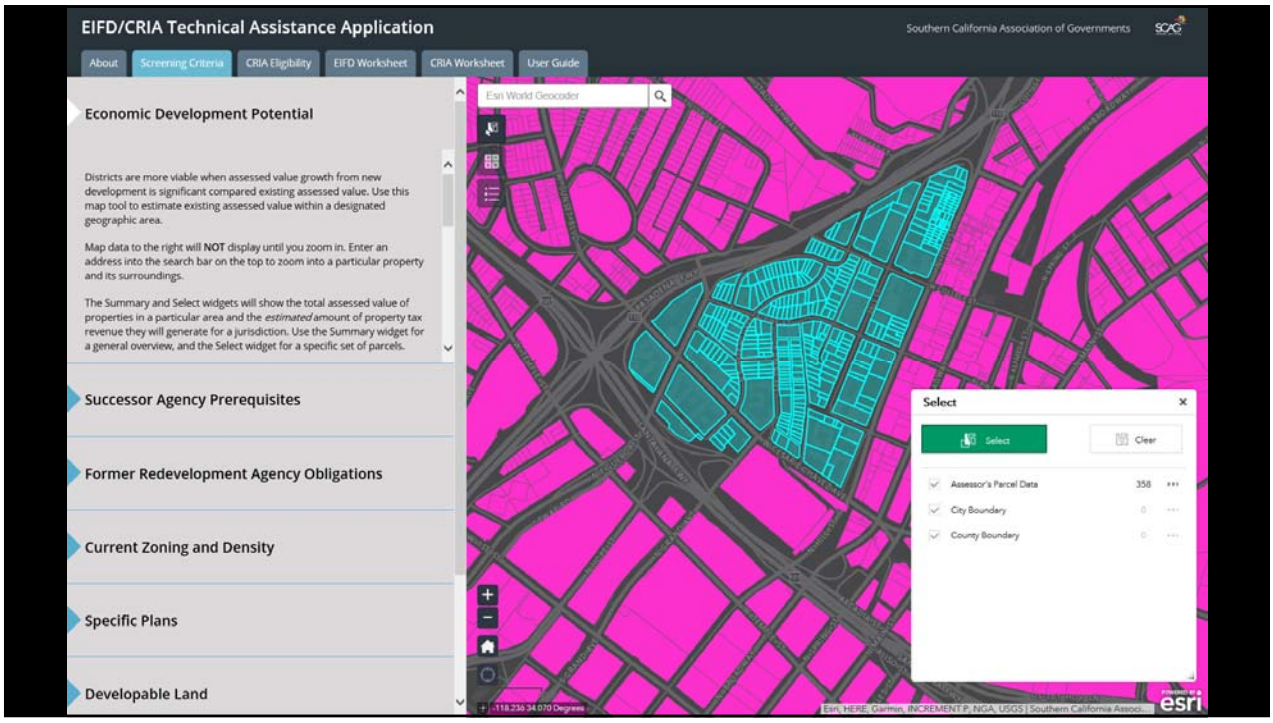
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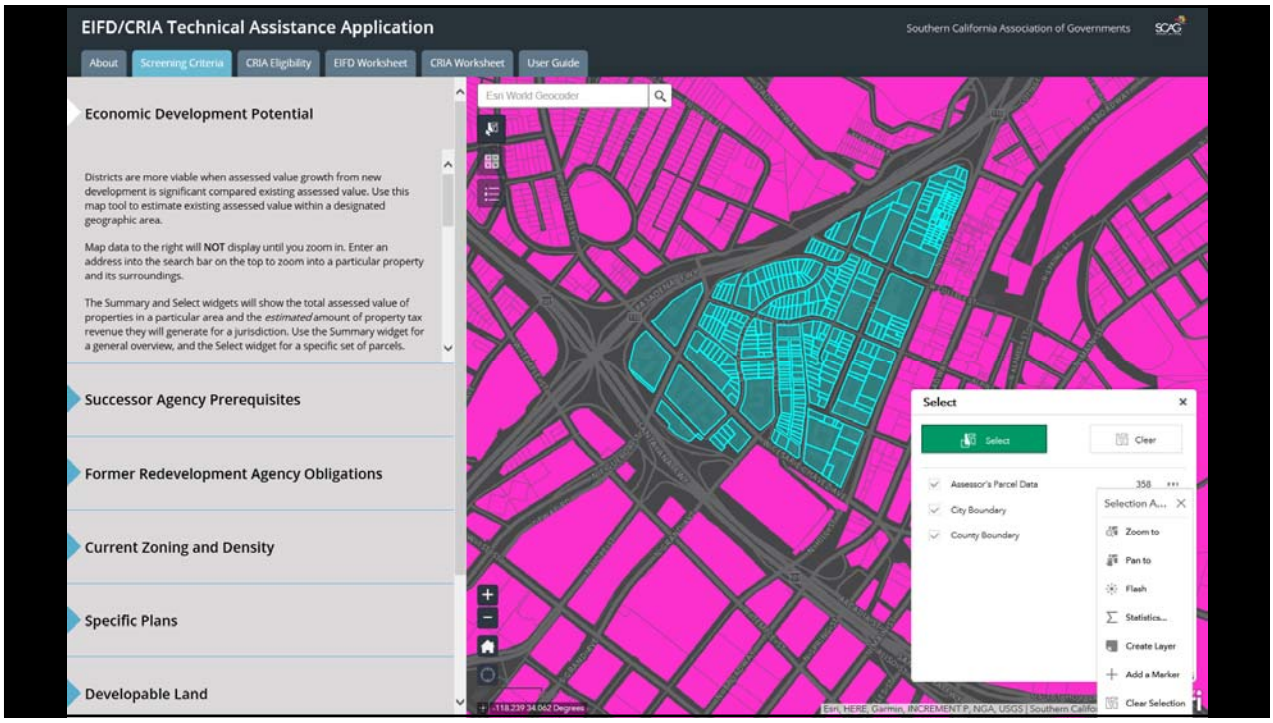
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Pan to
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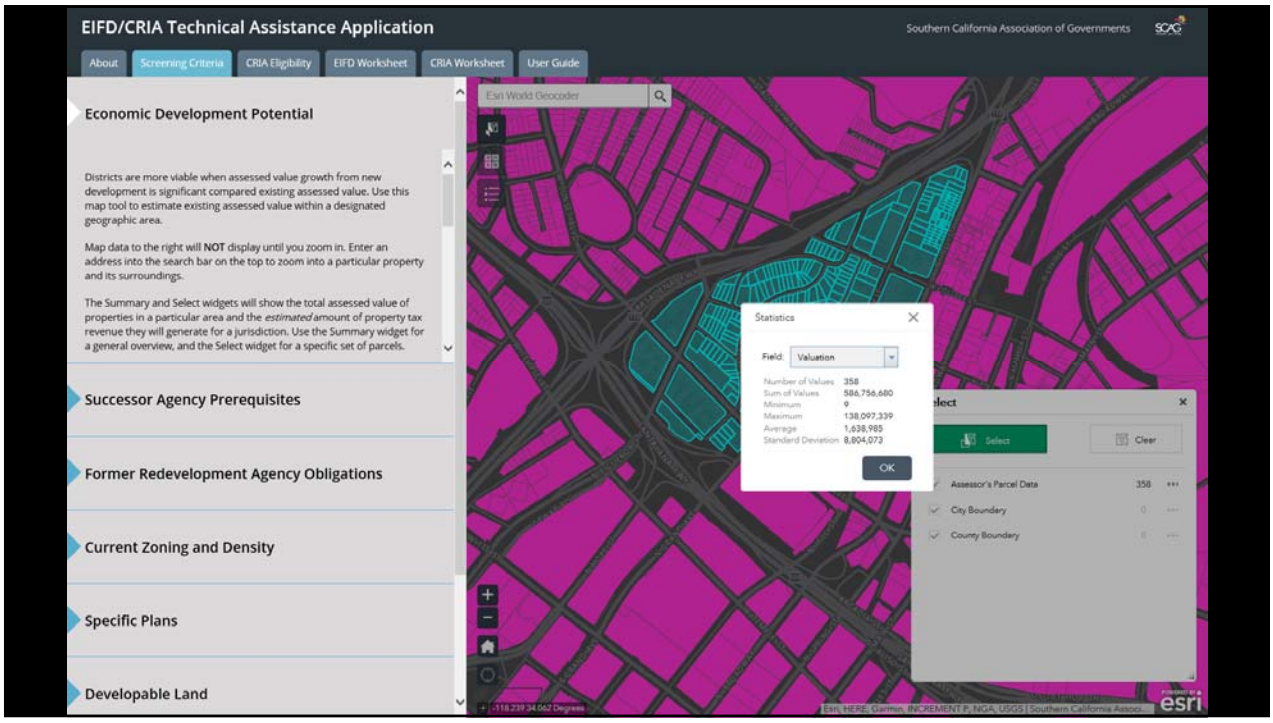
Create Layer
Add a Marker
Clear Selection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Statistics
Field: Valuation
Number of Values 358
Sum of Values 586,756,680
Minimum 0
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Standard Deviation 8,804,073
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City Boundary
County Boundary
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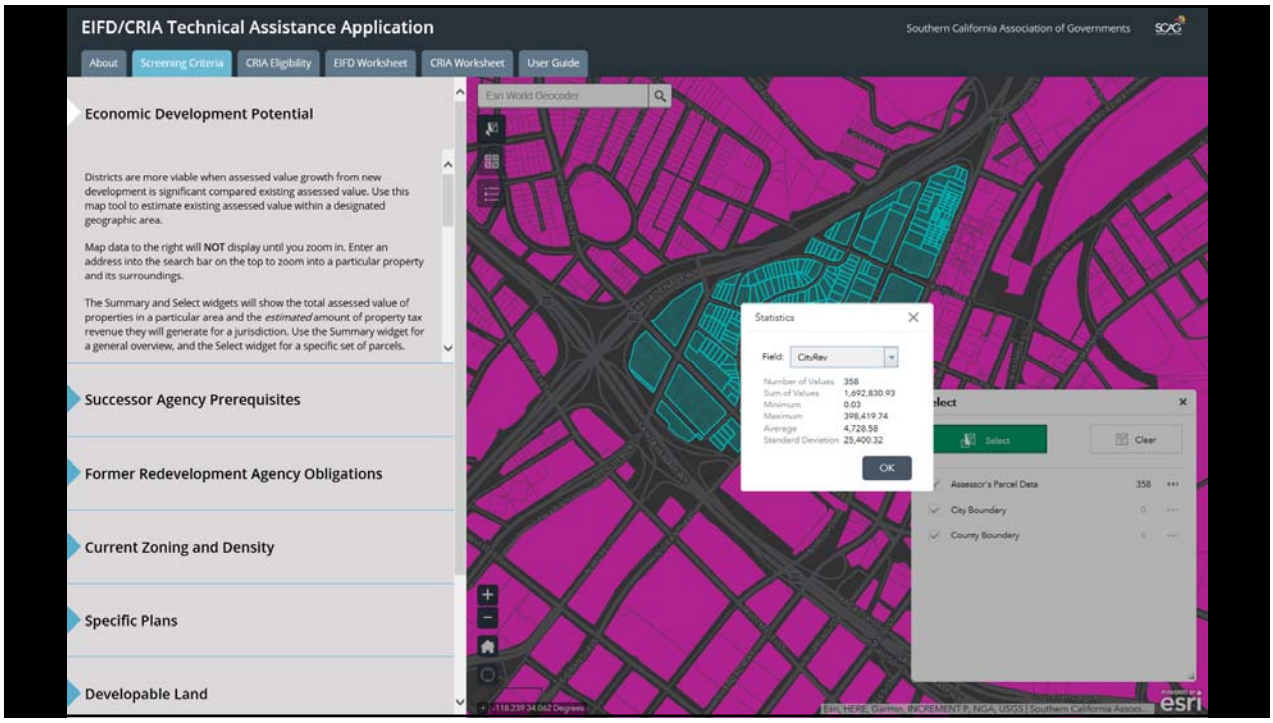
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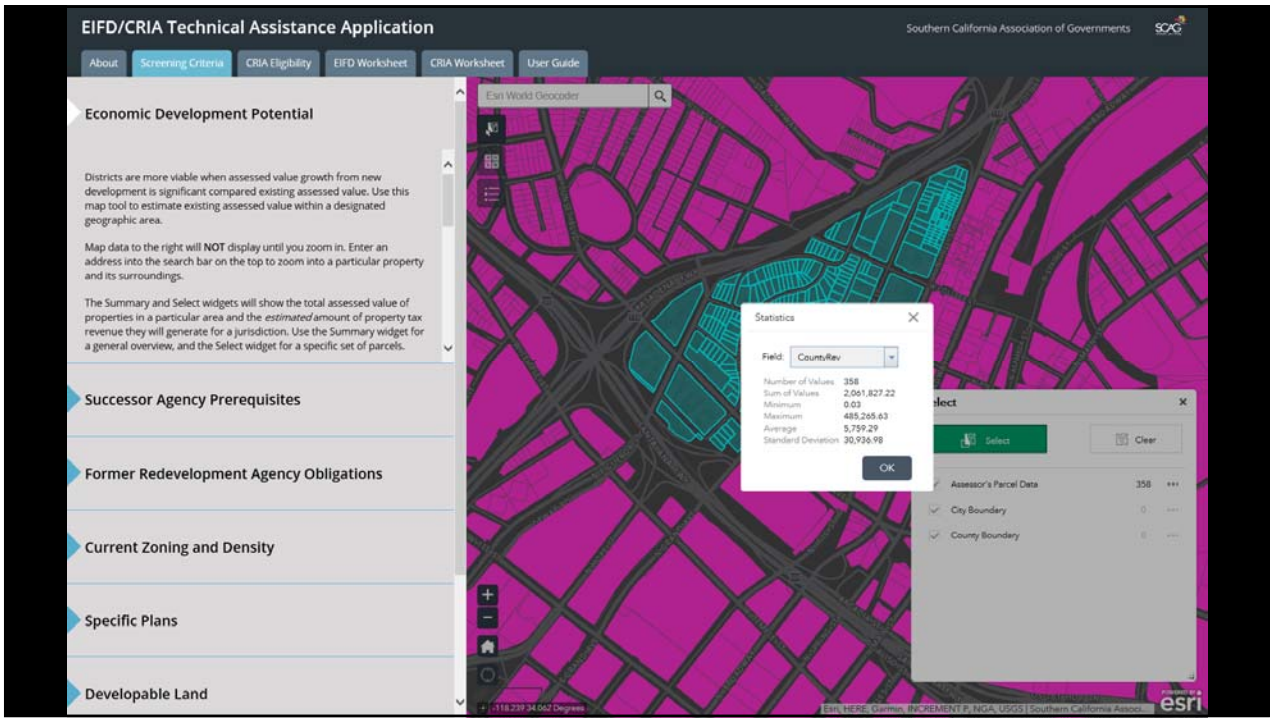
County Boundary
esri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Statistics
Field:
CountyRev
Number of Values 358
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Minimum 0.03
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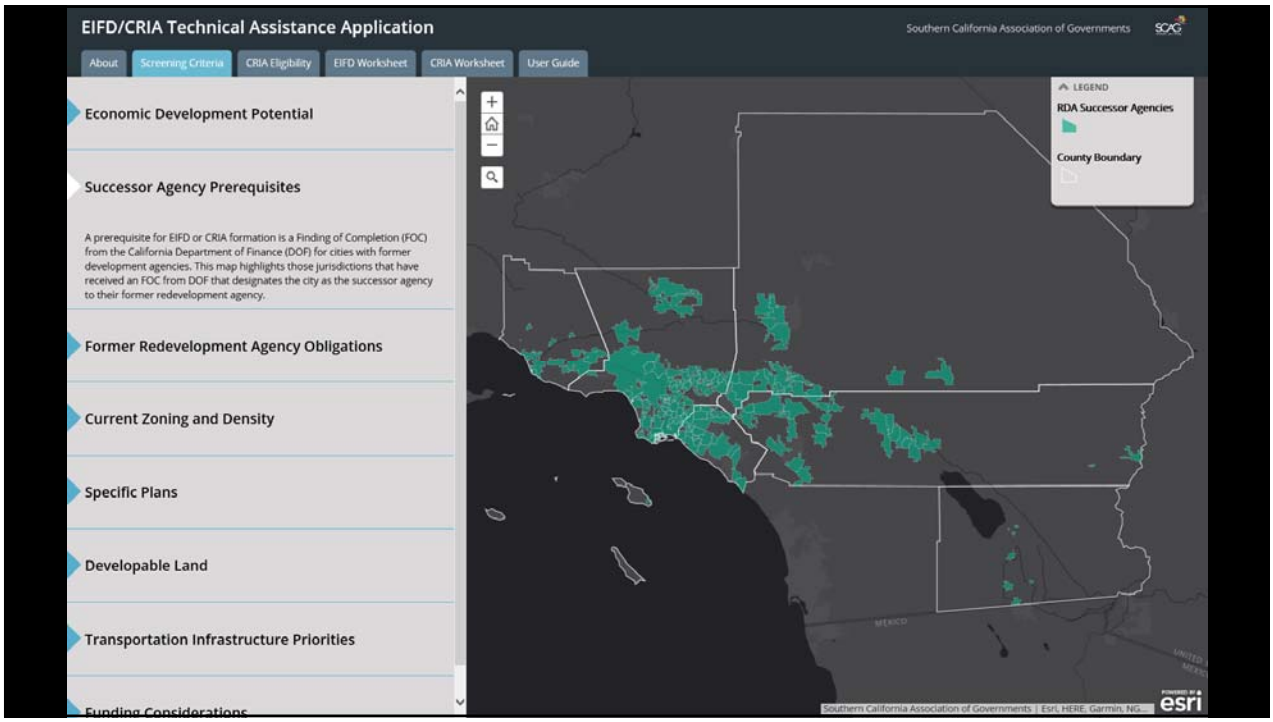
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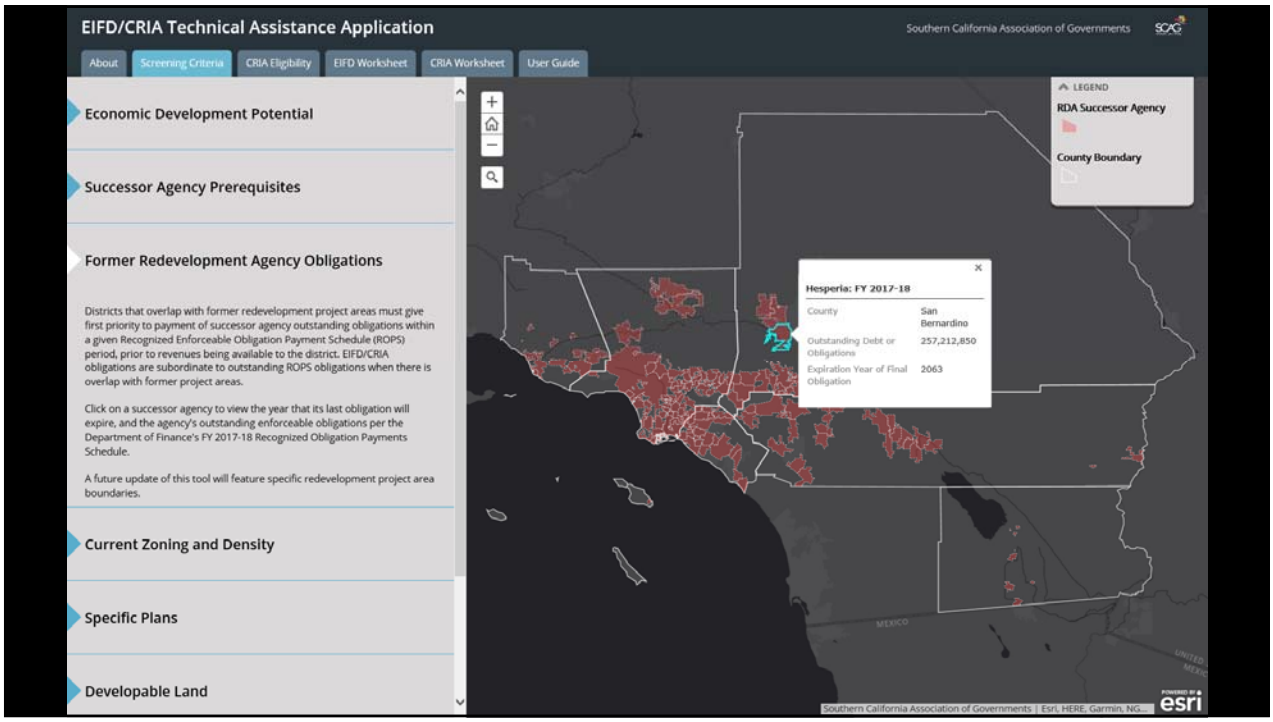
User Guide
Economic Development Potential
Successor Agency Prerequisites
A prerequisite for EIFD or CRIA formation is a Finding of Completion (FOC) from the California Department of Finance (DOF) for cities with former development agencies. This map highlights those jurisdictions that have received an FOC from DOF that designates the city as the successor agency to their former redevelopment agency.
Former Redevelopment Agency Obligations
Current Zoning and Density
Specific Plans
Developable Land
Transportation Infrastructure Priorities
Funding Considerations
LEGEND
RDA Successor Agencies
County Boundary
MEXICO
Southern California Association of Governments | Esri, HERE, Garmin, NG...
esri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Former Redevelopment Agency Obligations
Districts that overlap with former redevelopment project areas must give first priority to payment of successor agency outstanding obligations within a given Recognized Enforceable Obligation Payment Schedule (ROPS) period, prior to revenues being available to the district. EIFD/CRIA obligations are subordinate to outstanding ROPS obligations when there is overlap with former project areas.
Click on a successor agency to view the year that its last obligation will expire, and the agency's outstanding enforceable obligations per the Department of Finance's FY 2017-18 Recognized Obligation Payments Schedule.
A future update of this tool will feature specific redevelopment project area boundaries.
Current Zoning and Density
Specific Plans
Developable Land
LEGEND
RDA Successor Agency
County Boundary
Hesperia: FY 2017-18
County
San Bernardino
Outstanding Debt or Obligations
257,212,850
Expiration Year of Final Obligation
2063
MEXICO
Southern California Association of Governments | Esri, HERE, Garmin, NG...
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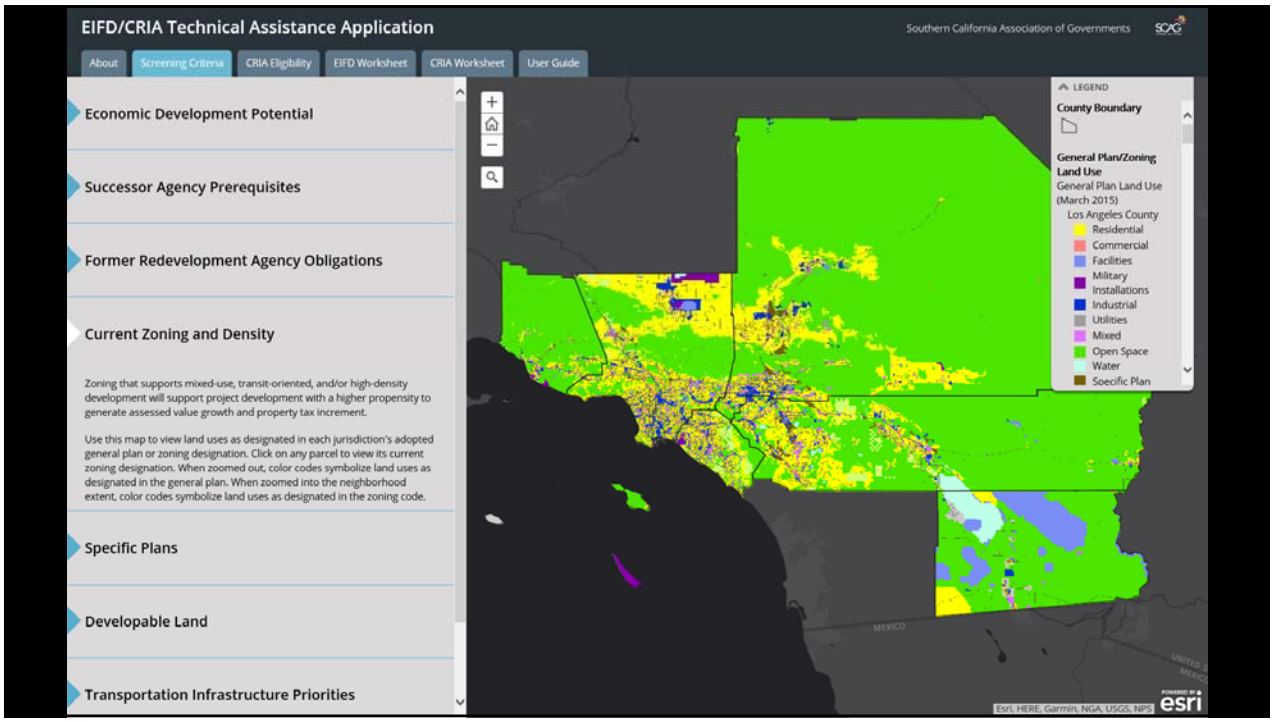
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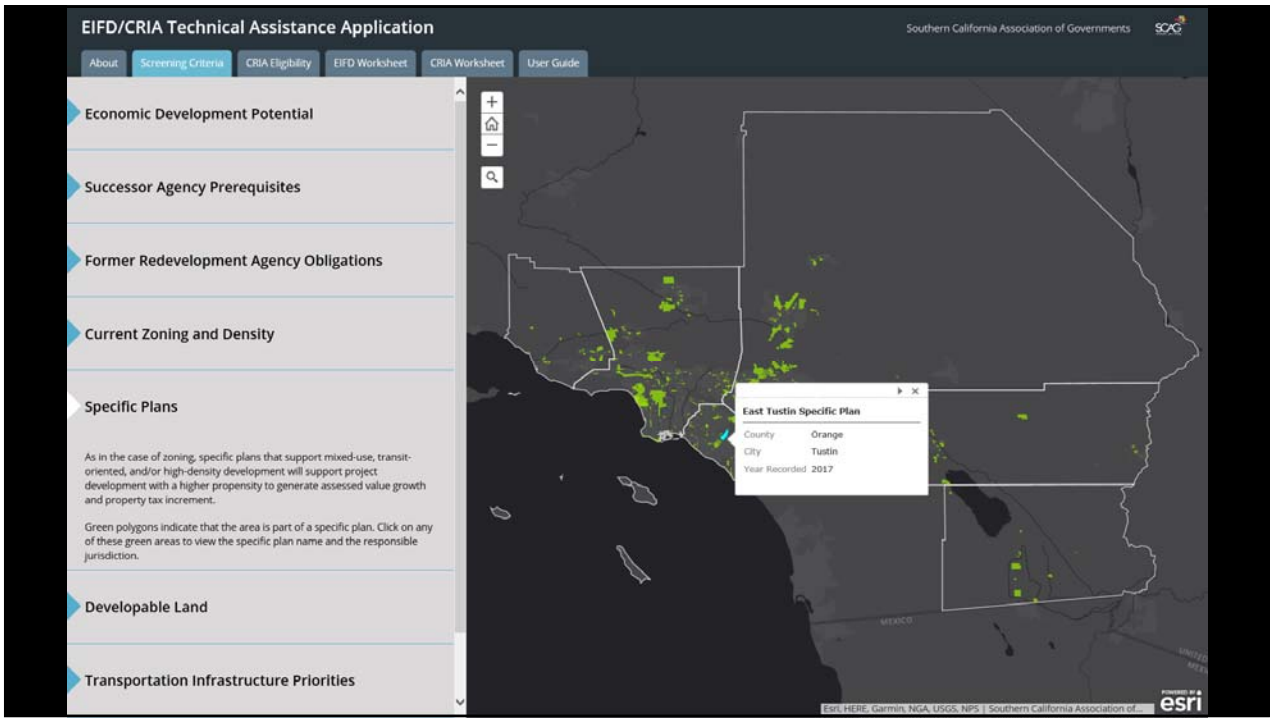
Current Zoning and Density
Zoning that supports mixed-use, transit-oriented, and/or high-density development will support project development with a higher propensity to generate assessed value growth and property tax increment.
Use this map to view land uses as designated in each jurisdiction's adopted general plan or zoning designation. Click on any parcel to view its current zoning designation. When zoomed out, color codes symbolize land uses as designated in the general plan. When zoomed into the neighborhood extent, color codes symbolize land uses as designated in the zoning code.
Specific Plans
Developable Land
Transportation Infrastructure Priorities
LEGEND
County Boundary
General Plan/Zoning Land Use
General Plan Land Use (March 2015)
Los Angeles County
Residential
Commercial
Facilities
Military Installations
Industrial
Utilities
Mixed
Open Space
Water
Specific Plan
MEXICO
Esri, HERE, Garmin, NGA, USGS, NPS
esri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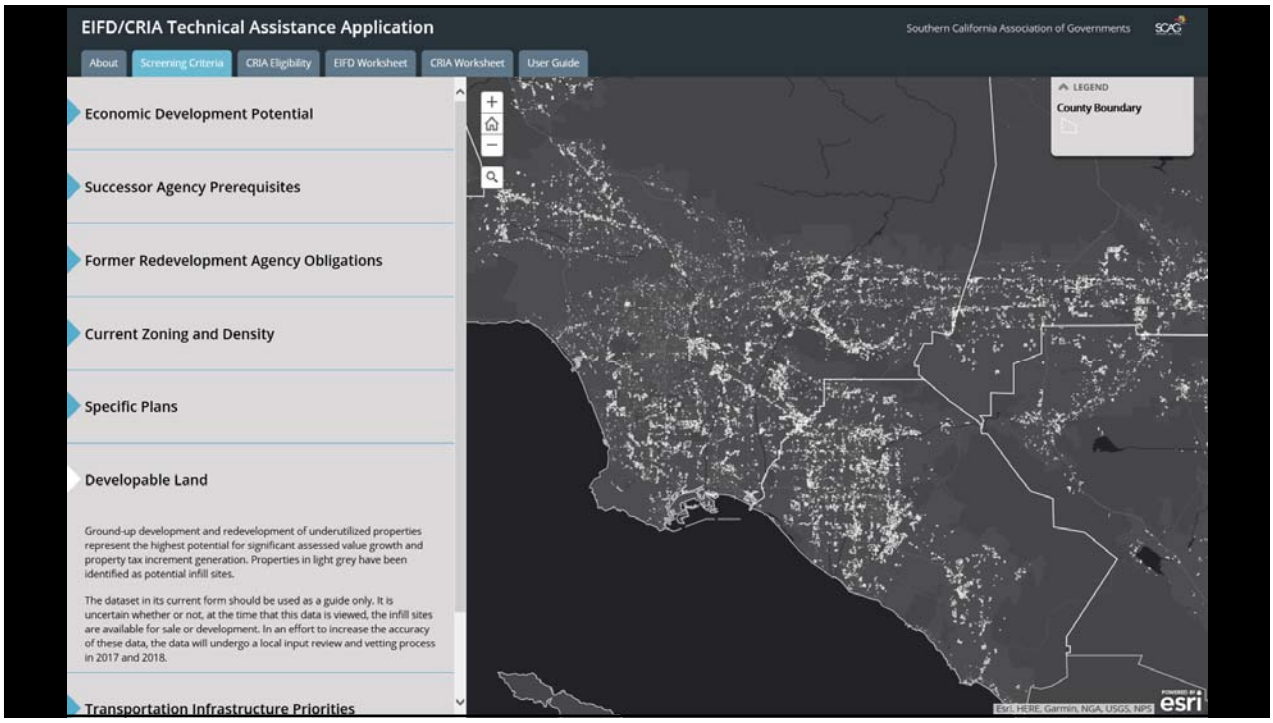
Specific Plans
As in the case of zoning, specific plans that support mixed-use, transit-oriented, and/or high-density development will support project development with a higher propensity to generate assessed value growth and property tax increment.
Green polygons indicate that the area is part of a specific plan. Click on any of these green areas to view the specific plan name and the responsible jurisdiction.
Developable Land
Transportation Infrastructure Priorities
East Tustin Specific Plan
County Orange
City Tustin
Year Recorded 2017
MEXICO
Esri, HERE, Garmin, NGA, USGS, NPS | Southern California Association of...
esri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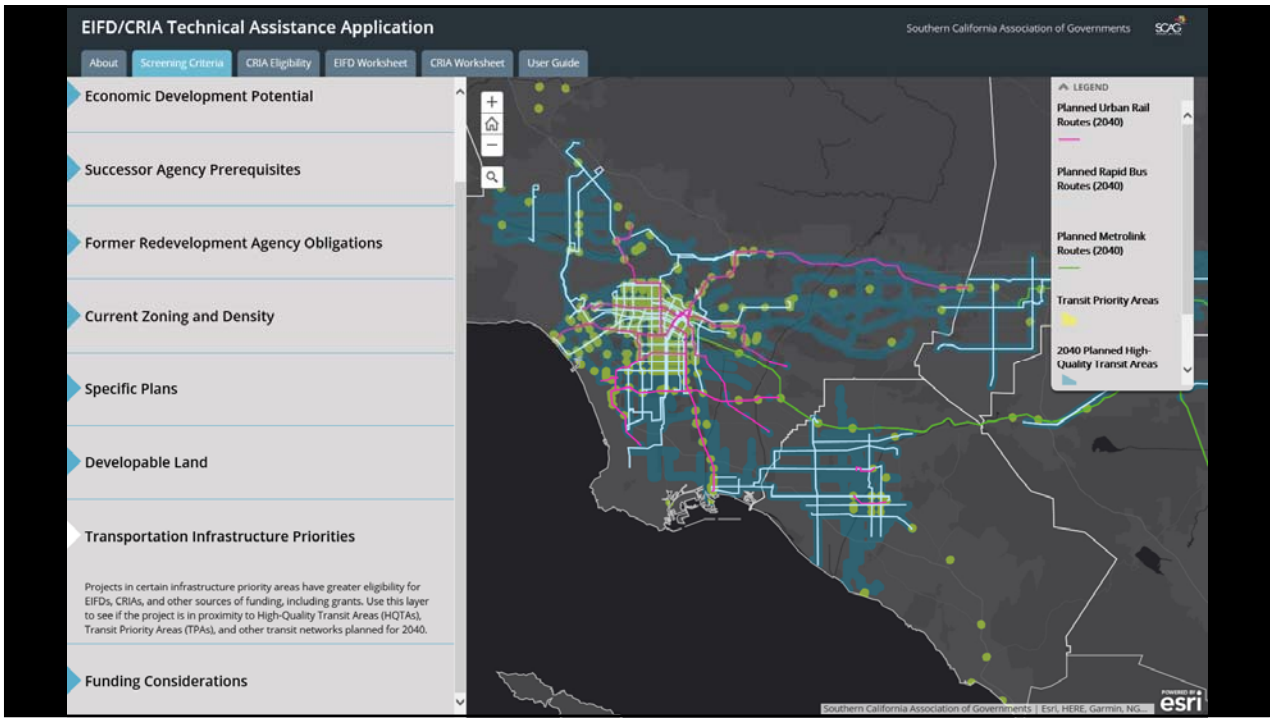
Ground-up development and redevelopment of underutilized properties represent the highest potential for significant assessed value growth and property tax increment generation. Properties in light grey have been identified as potential infill sites.
The dataset in its current form should be used as a guide only. It is uncertain whether or not, at the time that this data is viewed, the infill sites are available for sale or development. In an effort to increase the accuracy of these data, the data will undergo a local input review and vetting process in 2017 and 2018.
Transportation Infrastructure Priorities
LEGEND
County Boundary
Esri, HERE, Garmin, NGA, USGS, NPS
esri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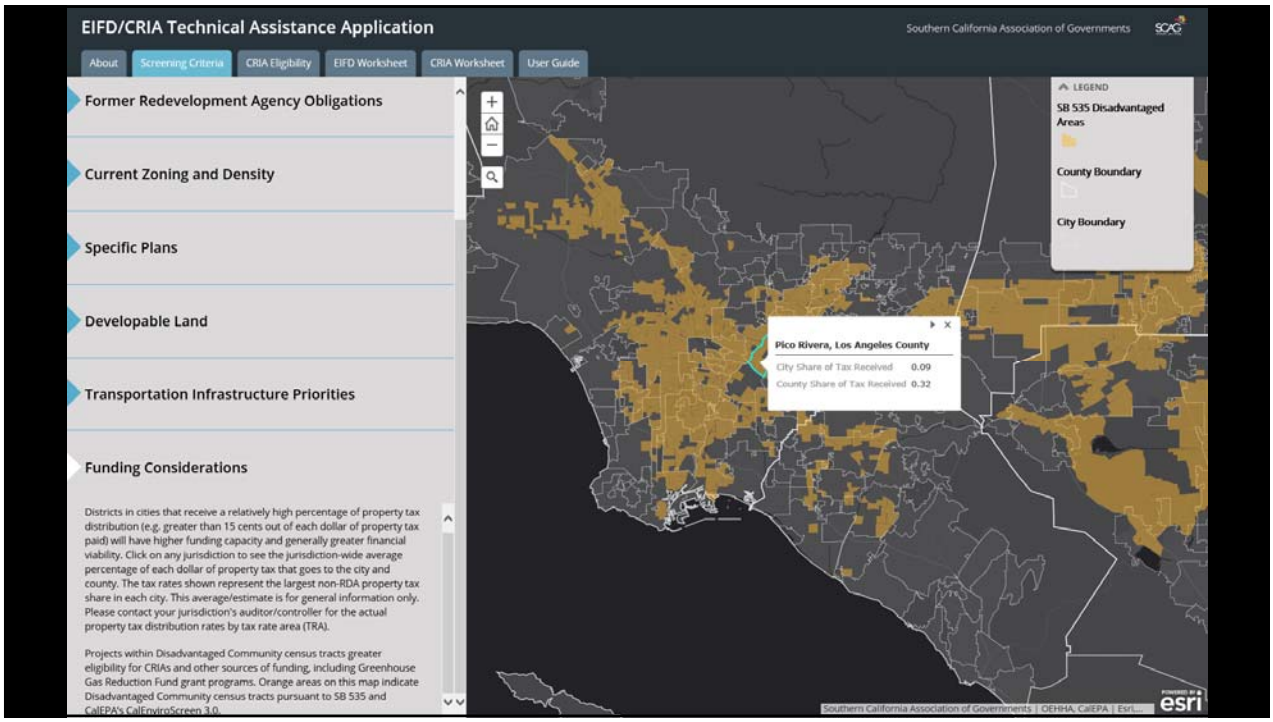
Transportation Infrastructure Priorities
Projects in certain infrastructure priority areas have greater eligibility for EIFDs, CRIAs, and other sources of funding, including grants. Use this layer to see if the project is in proximity to High-Quality Transit Areas (HQTAs), Transit Priority Areas (TPAs), and other transit networks planned for 2040.
Funding Considerations
LEGEND
Planned Urban Rail Routes (2040)
Planned Rapid Bus Routes (2040)
Planned Metrolink Routes (2040)
Transit Priority Areas
2040 Planned High-Quality Transit Areas
Southern California Association of Governments | Esri, HERE, Garmin, NG...
esri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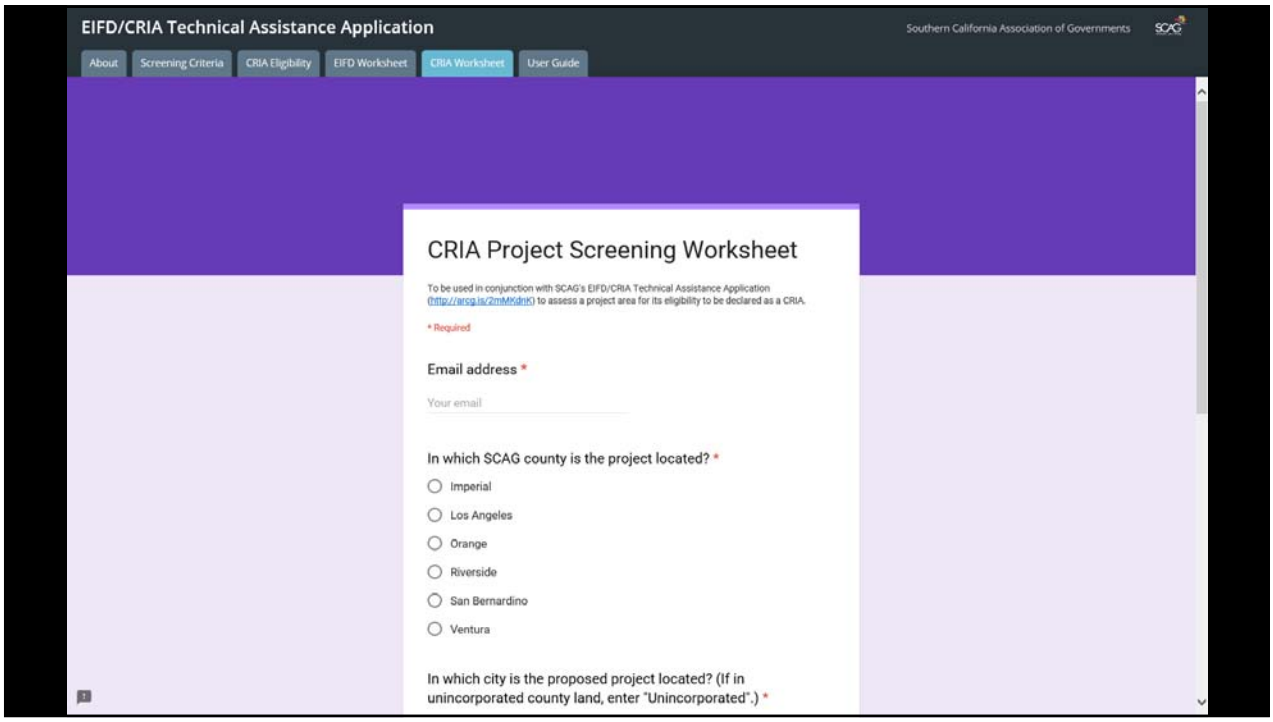
Funding Considerations
Districts in cities that receive a relatively high percentage of property tax distribution (e.g. greater than 15 cents out of each dollar of property tax paid) will have higher funding capacity and generally greater financial viability. Click on any jurisdiction to see the jurisdiction-wide average percentage of each dollar of property tax that goes to the city and county. The tax rates shown represent the largest non-RDA property tax share in each city. This average/estimate is for general information only. Please contact your jurisdiction's auditor/controller for the actual property tax distribution rates by tax rate area (TRA).
Projects within Disadvantaged Community census tracts greater eligibility for CRIAs and other sources of funding, including Greenhouse Gas Reduction Fund grant programs. Orange areas on this map indicate Disadvantaged Community census tracts pursuant to SB 535 and CalEPA's CalEnviroScreen 3.0.
LEGEND
SB 535 Disadvantaged Areas
County Boundary
City Boundary
Pico Rivera, Los Angeles County
City Share of Tax Received 0.09
County Share of Tax Received 0.32
Southern California Association of Governments | OEHHA, CalEPA | Esri...
esri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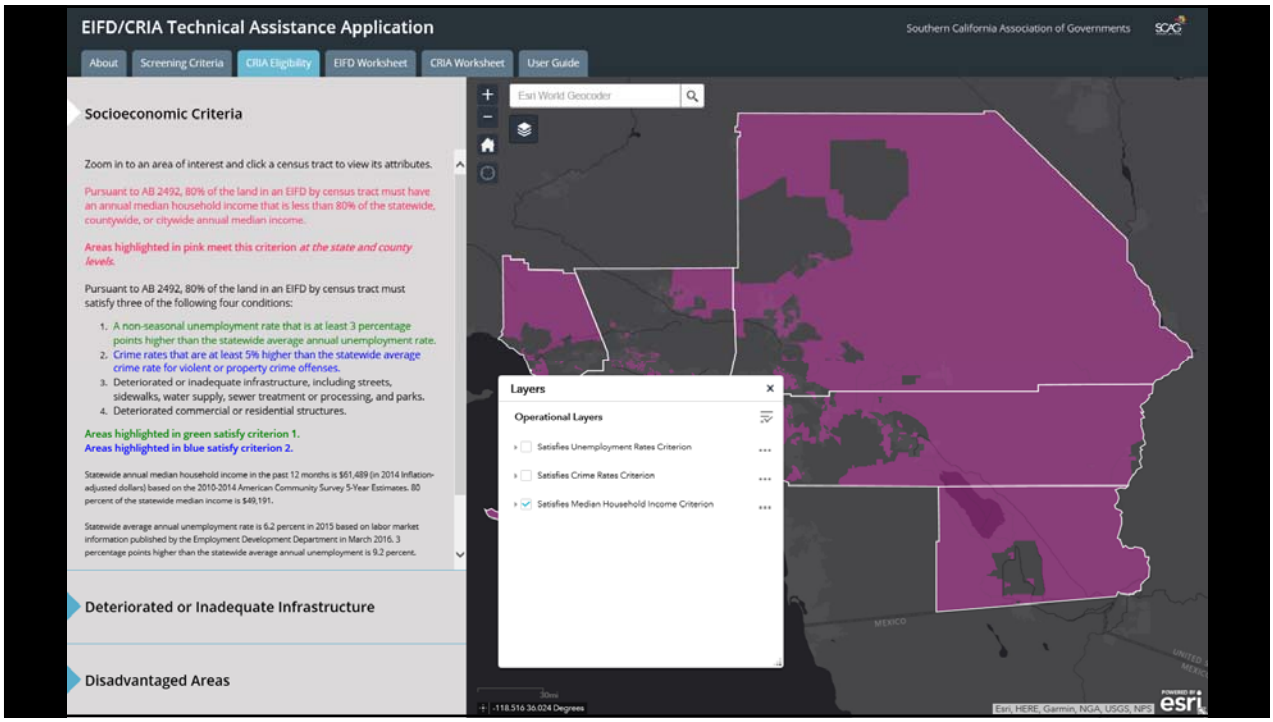
CRIA Project Screening Worksheet
To be used in conjunction with SCAG's EIFD/CRIA Technical Assistance Application (http://arcg.is/2mMKdnK) to assess a project area for its eligibility to be declared as a CRIA.
* Required
Email address *
Your email
In which SCAG county is the project located? *
Imperial
Los Angeles
Orange
Riverside
San Bernardino
Ventura
In which city is the proposed project located? (If in unincorporated county land, enter "Unincorporated".) *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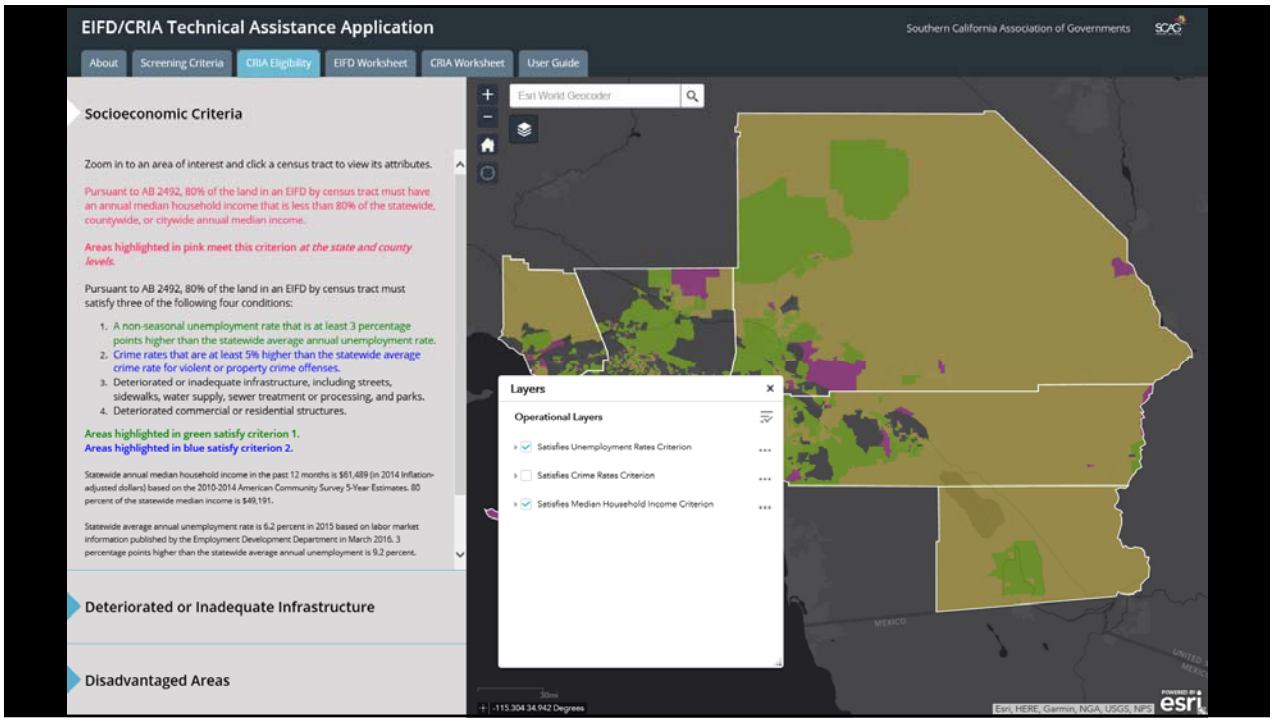
Socioeconomic Criteria
Zoom in to an area of interest and click a census tract to view its attributes.
Pursuant to AB 2492, 80% of the land in an EIFD by census tract must have an annual median household income that is less than 80% of the statewide, countywide, or citywide annual median income.
Areas highlighted in pink meet this criterion at the state and county levels.
Pursuant to AB 2492, 80% of the land in an EIFD by census tract must satisfy three of the following four conditions:
1. A non-seasonal unemployment rate that is at least 3 percentage points higher than the statewide average annual unemployment rate.
2. Crime rates that are at least 5% higher than the statewide average crime rate for violent or property crime offenses.
3. Deteriorated or inadequate infrastructure, including streets, sidewalks, water supply, sewer treatment or processing, and parks.
4. Deteriorated commercial or residential structures.
Areas highlighted in green satisfy criterion 1.
Areas highlighted in blue satisfy criterion 2.
Statewide annual median household income in the past 12 months is $61,489 (in 2014 inflation-adjusted dollars) based on the 2010-2014 American Community Survey 5-Year Estimates. 80 percent of the statewide median income is $49,191.
Statewide average annual unemployment rate is 6.2 percent in 2015 based on labor market information published by the Employment Development Department in March 2016. 3 percentage points higher than the statewide average annual unemployment is 9.2 percent.
Deteriorated or Inadequate Infrastructure
Disadvantaged Areas
Esri World Geocoder
Layers
Operational Layers
Satisfies Unemployment Rates Criterion
Satisfies Crime Rates Criterion
Satisfies Median Household Income Criterion
MEXICO
-118.516 36.024 Degrees
Esri, HERE, Garmin, NGA, USGS, NPS
esri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Deteriorated or Inadequate Infrastructure
Disadvantaged Areas
Esri World Geocoder
Layers
Operational Layers
Satisfies Unemployment Rates Criterion
Satisfies Crime Rates Criterion
Satisfies Median Household Income Criterion
MEXICO
-115.304 34.942 Degrees
Esri, HERE, Garmin, NGA, USGS, NPS
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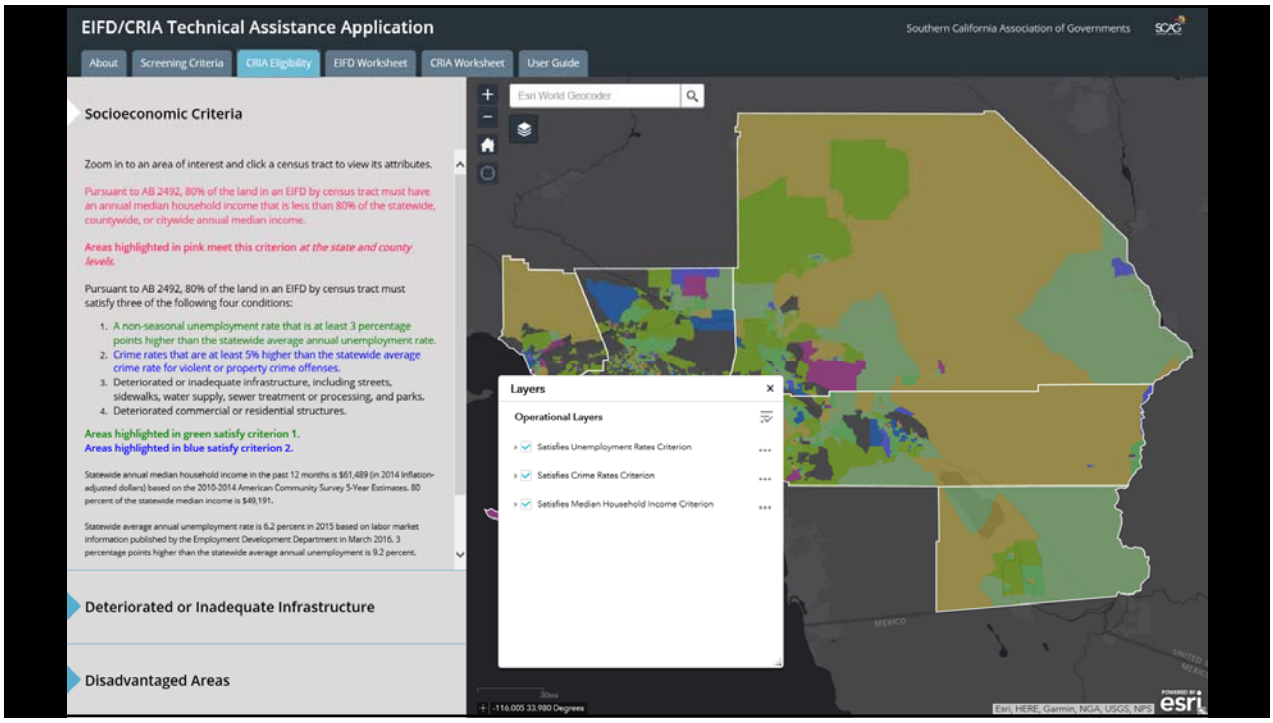
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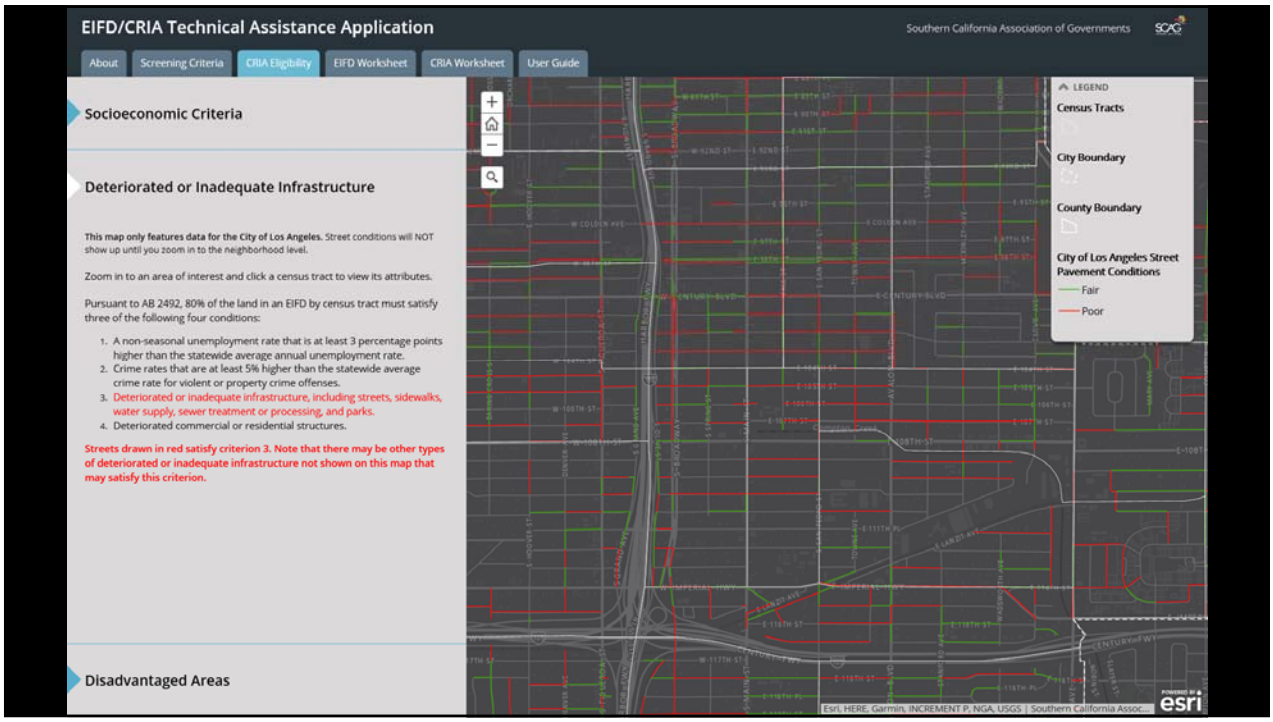
Statewide average annual unemployment rate is 6.2 percent in 2015 based on labor market information published by the Employment Development Department in March 2016. 3 percentage points higher than the statewide average annual unemployment is 9.2 percent.
Deteriorated or Inadequate Infrastructure
Disadvantaged Areas
Esri World Geocoder
Layers
Operational Layers
Satisfies Unemployment Rates Criterion
Satisfies Crime Rates Criterion
Satisfies Median Household Income Criterion
MEXICO
-116.005 33.980 Degrees
Esri, HERE, Garmin, NGA, USGS, NPS
esri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Socioeconomic Criteria
Deteriorated or Inadequate Infrastructure
This map only features data for the City of Los Angeles. Street conditions will NOT show up until you zoom in to the neighborhood level.
Zoom in to an area of interest and click a census tract to view its attributes.
Pursuant to AB 2492, 80% of the land in an EIFD by census tract must satisfy three of the following four conditions:
1. A non-seasonal unemployment rate that is at least 3 percentage points higher than the statewide average annual unemployment rate.
2. Crime rates that are at least 5% higher than the statewide average crime rate for violent or property crime offenses.
3. Deteriorated or inadequate infrastructure, including streets, sidewalks, water supply, sewer treatment or processing, and parks.
4. Deteriorated commercial or residential structures.
Streets drawn in red satisfy criterion 3. Note that there may be other types of deteriorated or inadequate infrastructure not shown on this map that may satisfy this criterion.
Disadvantaged Areas
LEGEND
Census Tracts
City Boundary
County Boundary
City of Los Angeles Street Pavement Conditions
Fair
Poor
Esri, HERE, Garmin, INCREMENT P, NGA, USGS | Southern California Assoc...
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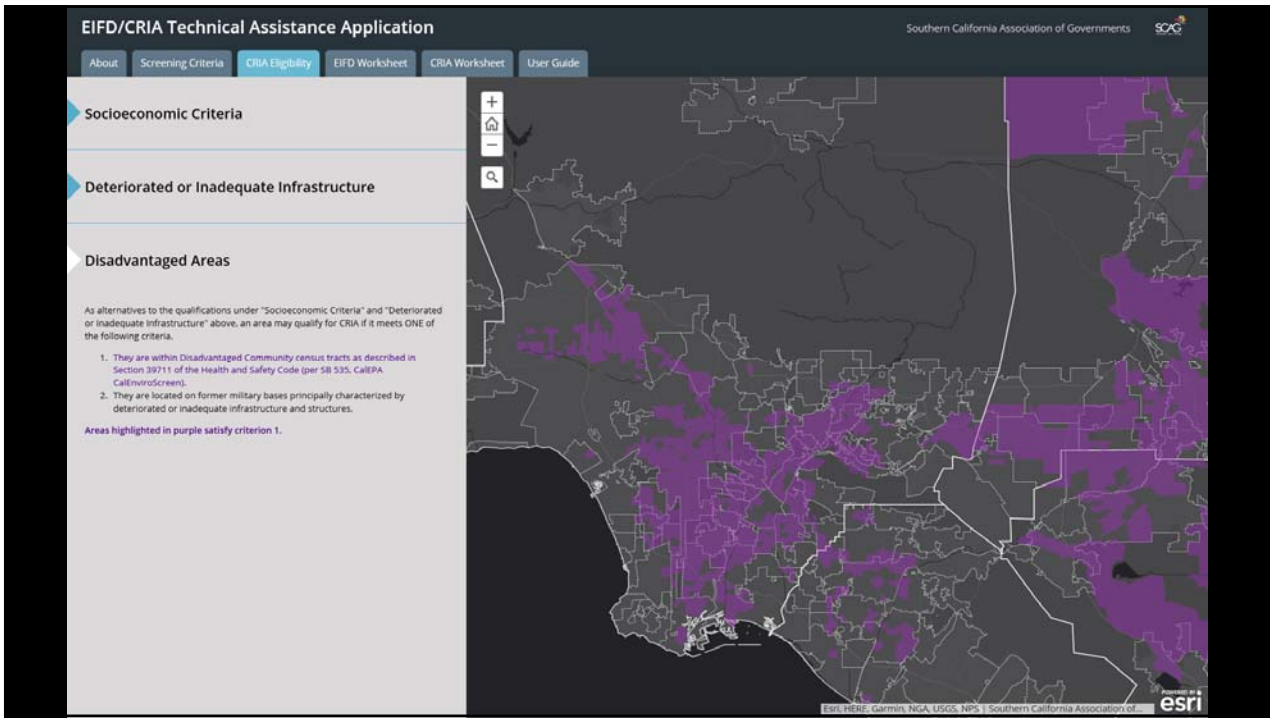
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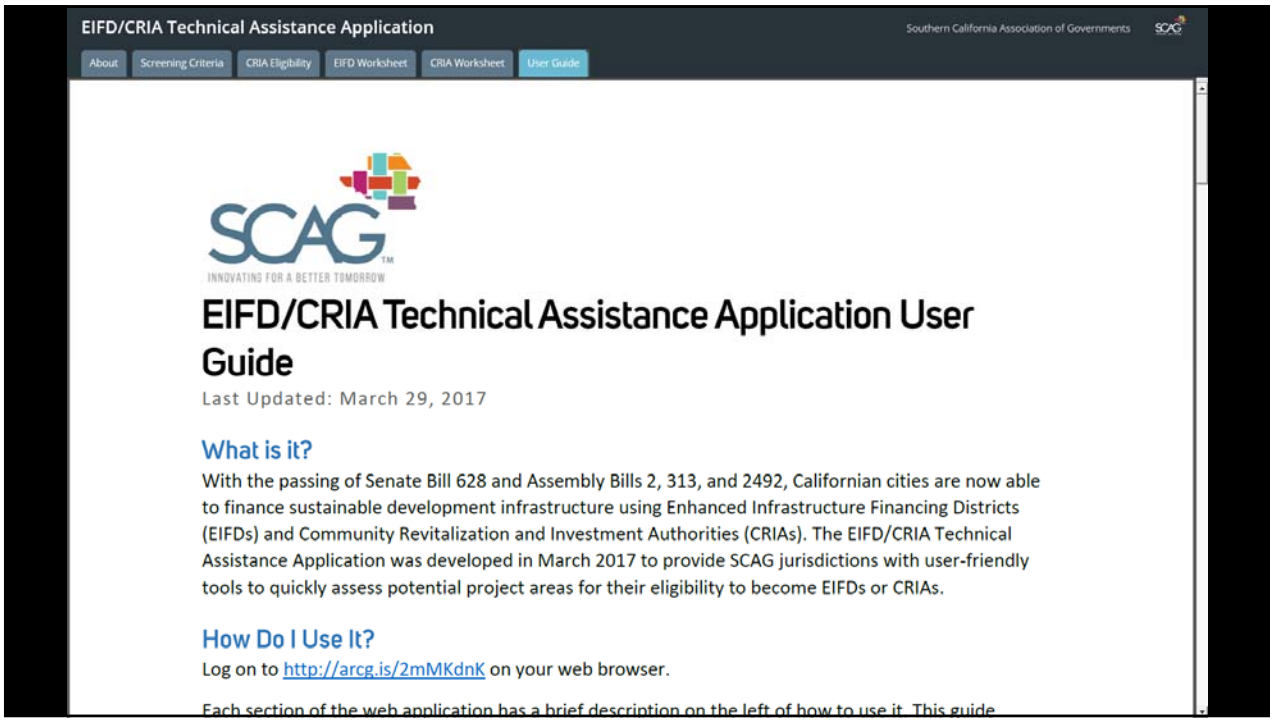
Deteriorated or Inadequate Infrastructure
Disadvantaged Areas
As alternatives to the qualifications under "Socioeconomic Criteria" and "Deteriorated or Inadequate Infrastructure" above, an area may qualify for CRIA if it meets ONE of the following criteria.
1. They are within Disadvantaged Community census tracts as described in Section 39711 of the Health and Safety Code (per SB 535, CalEPA CalEnviroScreen).
2. They are located on former military bases principally characterized by deteriorated or inadequate infrastructure and structures.
Areas highlighted in purple satisfy criterion 1.
Esri, HERE, Garmin, NGA, USGS, NPS | Southern California Association of...
esri



SCAG™

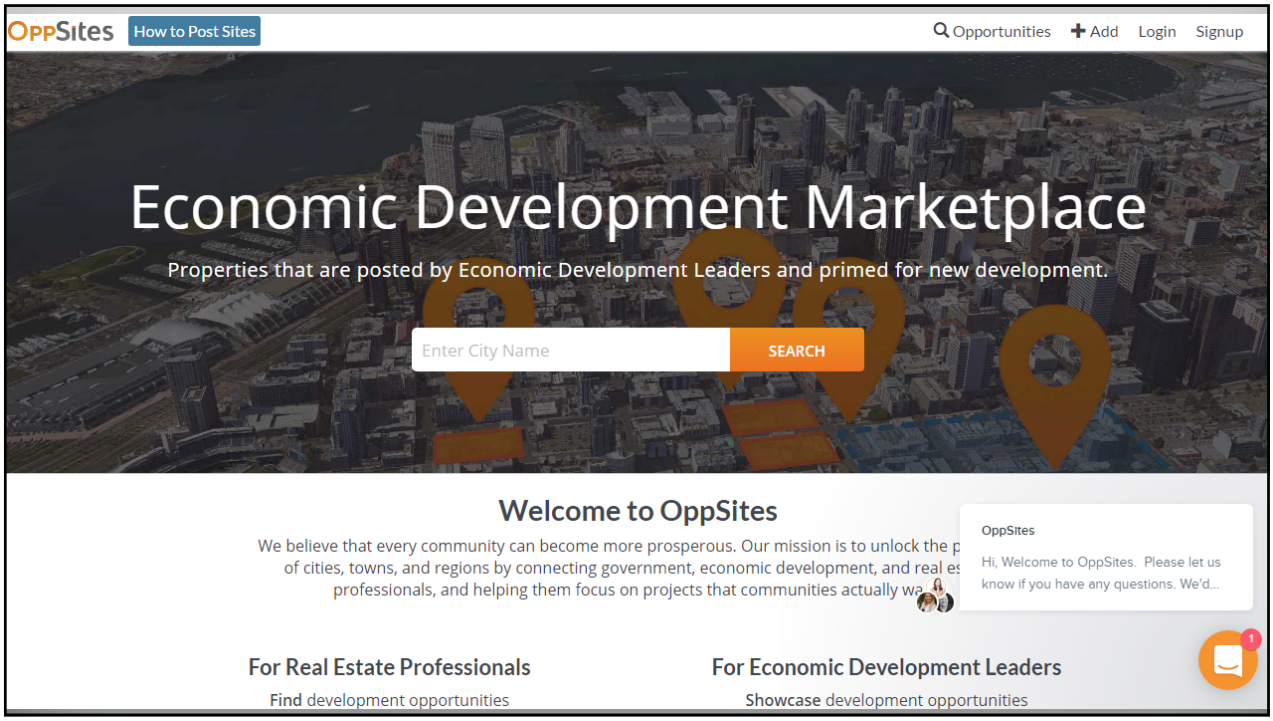
INNOVATING FOR A BETTER TOMORROW

Thank you!

Kimberly Clark, Regional Planner Specialist
clark@scag.ca.gov

Agenda

- Basic overview of Tax Increment Financing Districts
- Demonstration of SCAG's EIFD/CRIA Technical Assistance Application
- Demonstration of OppSites
- Overview of Metro's TOD Grant Opportunity + Transit Supportive Toolkit



Agenda

- Basic overview of Tax Increment Financing Districts
- Demonstration of SCAG's EIFD/CRIA Technical Assistance Application
- Demonstration of OppSites
- Overview of Metro's TOD Grant Opportunity + Transit Supportive Toolkit

Transit Oriented Development Planning Grant Program

Round 5 Workshop

Agenda

1. Welcome
2. Program Overview
3. Transit Supportive Planning Toolkit
   & Application
4. TOC TIF Application and SCAG Demonstration
5. Lessons Learned
6. Q&A

Metro

Program Overview

Metro

History and Background

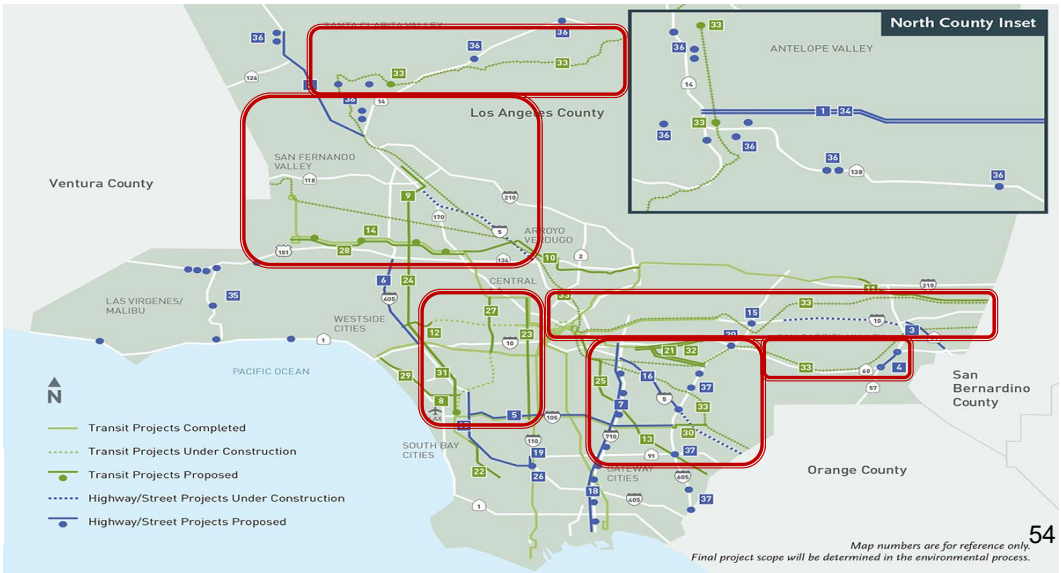
- > Measure R and M – rapid system expansion
- > June 2011 – TOD Planning Grant Program launched
- > Opportunity to promote Transit Supportive Planning
- > Remove obstacles to regulatory change

Metro

Existing Rail System

Transit System: Existing + Measure R Projects

We're Growing! Measure M Project Map



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Program Objectives

> Assist local governments to adopt Transit Supportive Regulatory plans

> Improve mobility, increase transit utilization

> Reduce GHGs through infill development

> Support and implement sustainable development principles

Metro

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Eligible Applicants

- Cities and the County of Los Angeles with land use regulatory jurisdiction:
  - > Within ½ mile of existing, planned or proposed Metro Rail or Bus Rapid Transit stations and adjacent transit corridors; and/or
  - > Within ½ mile of Metrolink Stations in LA County

Metro

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Eligible Activities (R1-R4)

- Examples of specific regulatory documents:
  - > New or amended general plans, specific plans, zoning ordinances, overlay zones
  - > Related environmental clearance documents
- Areas of study might include:
  - > Land use, density/height, parking requirements, bike/pedestrian access, public realm improvements

Metro

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Funding Awarded to Date

- Four Rounds, $21.6 million, 35 grants, 31 cities
  - > Round 1: $4,806,000 (December 2011)
  - > Round 2: $1,000,000 (December 2012)
  - > Round 3: $9,443,997 (February 2013)
  - > Round 4: $6,352,000 (January 2015)

Metro

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Funding Awarded to Date

Round 5: Updated Guidelines

- Program funding $3.1 million
- Transit Supportive Planning Toolkit
- Transit Oriented Communities Tax Increment Financing (TOC TIF) Pilot Program
- Updated Grant Applications for TOD and TOC TIF

Metro

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Updated Guidelines

- Guidance on Metro's definition of Transit Supportive Planning
- Quarterly briefings
- Coordination on draft work products
- Procedures on project delays

Metro

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Grant Eligible Use of Funds

1. Regulatory Plans/Documents including:
   - General Plan updates; Specific Plans; TOD Districts, Zoning Ordinances; other forms of Overlay Zones
   - Related environmental clearance documents
   - Studies that support directly or indirectly regulatory plans
2. TOC TIF Feasibility Studies
   - EIFD/CRIA studies

Metro

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Grant Eligible Use of Funds

Examples of eligible activities:

- Staff and third party consulting costs
- Direct overhead/administrative costs
- Community outreach and related costs for food and non cash incentives

Examples of non-eligible activities:

- Indirect costs such as equipment, vehicles, office leases, food
- Staff overtime, staff mileage, use of pool vehicles
- Construction activities

Metro

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Transit Supportive Planning Toolkit And Grant Application

Metro

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Transit Supportive Planning Toolkit (Toolkit)

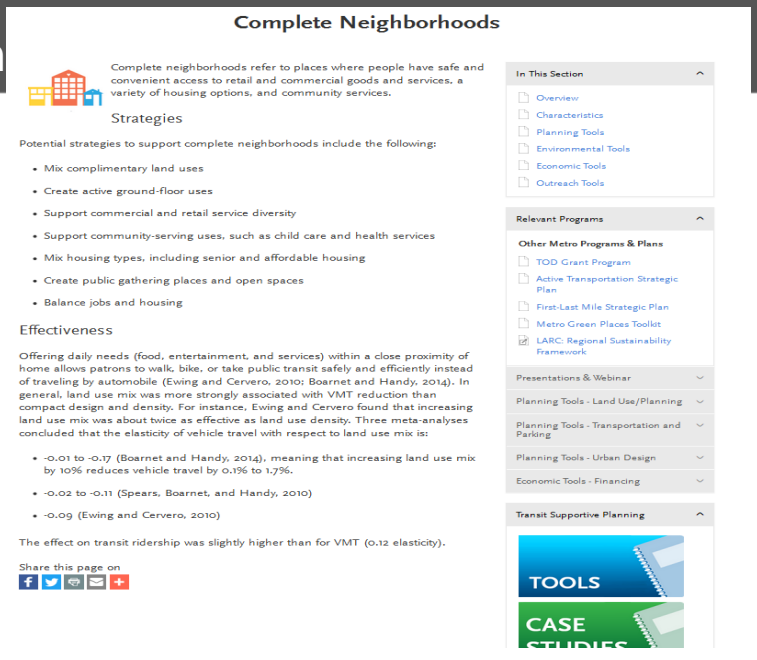
- Resource for local governments to advance Transit Supportive Planning holistically
- Includes locally relevant strategies, best practices, tools to:
  - Increase Transit ridership
  - Reduce VMT
  - Advance sustainable development practices
- Over 100 case studies
- metro.net/projects/tod-toolkit/
- Funded by the Strategic Growth Council

Metro

10 Elements of Transit Supportive Places

Metro

Elements Description



Complete Neighborhoods

Complete neighborhoods refer to places where people have safe and convenient access to retail and commercial goods and services, a variety of housing options, and community services.

Strategies

Potential strategies to support complete neighborhoods include the following:

- Mix complimentary land uses
- Create active ground-floor uses
- Support commercial and retail service diversity
- Support community-serving uses, such as child care and health services
- Mix housing types, including senior and affordable housing
- Create public gathering places and open spaces
- Balance jobs and housing

Effectiveness

Offering daily needs (food, entertainment, and services) within a close proximity of home allows patrons to walk, bike, or take public transit safely and efficiently instead of traveling by automobile (Ewing and Cervero, 2010; Boarnet and Handy, 2014). In general, land use mix was more strongly associated with VMT reduction than compact design and density. For instance, Ewing and Cervero found that increasing land use mix was about twice as effective as land use density. Three meta-analyses concluded that the elasticity of vehicle travel with respect to land use mix is:

- -0.01 to -0.17 (Boarnet and Handy, 2014), meaning that increasing land use mix by 10% reduces vehicle travel by 0.1% to 1.7%.
- -0.02 to -0.11 (Spears, Boarnet, and Handy, 2010)
- -0.09 (Ewing and Cervero, 2010)

The effect on transit ridership was slightly higher than for VMT (0.12 elasticity).

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Planning Tools
Environmental Tools
Economic Tools
Outreach Tools

Relevant Programs
Other Metro Programs & Plans
TOD Grant Program
Active Transportation Strategic Plan
First-Last Mile Strategic Plan
Metro Green Places Toolkit
LARC: Regional Sustainability Framework
Presentations & Webinar
Planning Tools - Land Use/Planning
Planning Tools - Transportation and Parking
Planning Tools - Urban Design
Economic Tools - Financing

Transit Supportive Planning
TOOLS
CASE STUDIES

Metro

How the Tools are Organized

Four Categories of Tools

- Land Use and Planning
- Environmental Tools
- Economic Tools
- Outreach Tools

Includes:

- Description and Alignment with Best Practice Category
- Strategies (potential strategies to support tool)
- Outcomes
- Links to Case Studies

Metro

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Example: Transportation and Parking Tools

> Bike-Share Programs
> Bike Stations
> Car-Share Programs
> Innovative Parking Design
> Parking Benefit Districts
> Parking Minimums and Maximums
> Parking Management Districts
> Shared Parking
> TDM Ordinance
> Traffic Calming
> Transportation Master Plans

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Tools

Parking Management Districts

Best Practice Category:

Site Layout, Parking Layout & Building Design | Parking Management | Transportation Demand Management

credit: City of Redwood

Local jurisdictions can utilize parking management districts in order to better manage parking supply and demand in TOD districts. This tool allows local jurisdictions to regulate parking supply, parking pricing, and promote more parking turnover and transit use within a TOD district or in others area of a community with a diverse mix of uses. Further, parking management districts can be utilized to manage both private and public parking supplies and lead to more efficient use of existing parking resources, reducing the need to construct additional parking supply.

Two key components of successful parking management districts include supply management strategies, such as offering shared parking, establishing maximum parking ratios, allowing off-site parking, or modifications to parking minimums, and pricing policies. Together these components can encourage a balanced transportation system and enhance economic development. The parking supply in a parking management district can be managed on a project-by-project basis or through the development of centralized or shared parking facilities.

Outcomes

- More flexible parking requirements

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Example: Community Engagement Best Practices

1. Craft a clear plan
2. Foster partnerships
3. Engage and maintain contact with stakeholders
4. Use multiple modes of communication
5. Make it fun
6. Reframe the discussion
7. Make it personal
8. Use visual tools to engage

Case Study: Vision Lennox

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Transit Supportive Planning Toolkit - Case Studies

he case study list can filtered by Case Study Name, Section, and Subsection. Go to your desired column, click on the arrow and select your filter. Or use the Search box to narrow your search b erm.

how 10 entries Search:

Case Study	Category	Tools	Location	Community Size
Active Streets Los Angeles	Financing	Caltrans Sustainable Transportation Planning Grant Program	Los Angeles, CA	Large
Anderson Munger Family YMCA	Financing	New Markets Tax Credit	Los Angeles, CA	Large
Artesia City Center Mixed Use Overlay Zone	Land Use and Planning	Overlay Zone	Artesia, CA	Small
Azusa Development Code	Land Use and Planning	Form-Based Codes	Azusa, CA	Small
Baldwin Park Downtown TOD Specific Plan	Land Use and Planning	Incentives & Bonuses	Baldwin Park, CA	Small
Bay Area Bike Share	Transportation and Parking	Bike-Share Programs	San Francisco, CA	Large
Berkeley Pedestrian Master Plan	Transportation and Parking	Transportation Master Plans	Berkeley, CA	Medium

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Using the Toolkit

1. Go to https://www.metro.net/projects/tod-toolkit/
2. Review the 6 benefits (making the case)
3. Identify which of the 10 characteristics of Transit-supportive Development are a) directly related to your project, b) secondarily related, c) don't apply.

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Application Review: Planning Grant

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TOD Completing the Application

Section 1: Project Scope/Description *(10 points)*

1. Project Area/Targeted Communities:
   a. Identify transit lines and stations, and it's significance to local community, transit connectivity, access and ridership
   b. Barriers to public transportation usage and multi-modalism
   c. Prominent community equity concerns
2. Project area map illustrating ½ mile radius or transit corridors

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TOD Completing the Application

Section 2: Existing Conditions and Regulatory Constraints *(10 points)*

1. Using 10 characteristics, provide clear and specific description of proposed project area's existing conditions and regulatory constraints to creating an equitable transit supportive place.
2. What existing regulatory constraints preclude jurisdiction from addressing identified equity issues?

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TOD Completing the Application

Section 3: Proposed Regulatory Changes and Impact *(35 points)*

1. Using Toolkit, describe specific regulatory documents that will require revision/new regulatory documents that will be developed.
2. Describe how proposed project will address, mitigate, and/or improve challenges described. How will the project accomplish goals set forth in Toolkit for creating transit supportive places?

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TOD Completing the Application

Section 4: Public Participation *(20 points)*

1. Describe proposed project's targeted communities and existing population. Identify key stakeholders and describe experience working with these groups or how they will be engaged in the process.
2. Outline a comprehensive, meaningful public participation and outreach plan that will bring the proposed regulatory changes forward.

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TOD Completing the Application

Section 5: Future Project Implementation *(10 points)*

1. Describe existing opportunity sites: parcels of land that could be developed/redeveloped using Toolkit principles.
2. Describe long-term implementation plan for building a successful transit supportive community after grant-funded regulatory changes are adopted.

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TOD Completing the Application

Section 6: Staffing and Administrative Plan *(15 points)*

1. Project Tasks, Schedule, and Budget
2. Project Management
3. Prior Grant Performance (if applicable)

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TOD Completing the Application

> Signature Page

> Attachment A – Tasks, Schedule, and Budget

> Attachment B – Task Description, Approach and Deliverables

> Maps of proposed project area

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Transit Oriented Communities Tax Increment Financing Pilot Program

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TOC TIF Pilot Program

- Partnership with Southern California Association of Governments (SCAG)
  - Technical Assistance Application
- Initial Feasibility Studies
  - Community Revitalization and Investment Authority (CRIA) and
  - Enhanced Infrastructure Financing District (EIFD) districts and related community visioning

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TOC TIF Background

- Redevelopment Dissolution in 2012
- 2014: SB 628/AB 313 (amended) legislation created EIFDs
- EIFDs issue TIF bonds to fund certain projects:
  - Public works infrastructure
  - Environmental remediation and sustainable economic development
  - Transit priority
  - Affordable housing

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TOC TIF Background

- EIFDs are separate entities, formed through JPA that consist of cities, counties, and special districts
- EIFDs is governed by separate entity called Public Financing Authority (PFA) comprised of:
  - Majority of members from participating taxing entities (e.g. city, county , and special districts)
  - Minimum of two public members
- EIFDs and CRIA can only be formed by entities whose successor agencies have received a Finding of Completion from DOF

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TOC TIF Background

- 2015: AB 2/AB 2492 (amendment) legislation created CRIA
- CRIA may issue bonds backed by combined property tax increment revenues & complementary funding sources
- CRIA funds same projects as EIFD, but
  - Includes land acquisition/sale, and
  - Requires 25% of tax increment revenue be dedicated to affordable housing
- CRIA is formed in two ways:
  1. JPA that can include city, county and special district
  2. By a city, county or city and county directly
  - CRIA areas must qualify via measures of income, crime, unemployment, deteriorated structures, and other measures

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TOC TIF Pilot Eligible Applicants

- Cities and the County of Los Angeles with land use regulatory jurisdiction:
  - Within ½ mile of Metro Rail, Bus Rapid Transit or Metrolink Stations (in LA County) stations and adjacent transit corridors;
  - Have adopted or are currently developing a transit supportive regulatory planning document; and
  - Measure favorably against SCAG's online EIFD/CRIA Technical Assistance Application

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SCAG Technical Assistance Application

> http://arcg.is/2mMKdnK

> Applicants must meet State EIFD/CRIA criteria to complete Part 2 of Metro TOC TIF application

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Completing the Pre-Application

Part 1: Litmus Test Screening Criteria

1. Successor Agency Prerequisites
   - If overlap with former Redevelopment Agency parcels, provide evidence of receipt of Finding of Completion from Dept. of Finance (DOF)
   - Provide most recent Recognized Obligation Payment Scheduled (ROPS), approximate amount of outstanding obligations ($), and date of expiration of last obligation
2. Economic Development
   - Provide total assessed value of parcels in the

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Completing the Pre-Application

3. Zoning and Density

- Adopted Transit Supportive Regulatory document encompasses the study area or one underway

4.Potential Financing Solutions

- Tax Increment Capture: Indicate rate of city capture for every dollar ($1) or property tax within project area; also identify other potential sources of revenue (e.g. property tax in-lieu of VLF, sales tax, grants, other)

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Completing the Pre-Application

5. Community Revitalization Investment Authority (CRIA) Qualification

- 80% of the land in project area by census tracts, block groups, or both have annual median household income less than 80% of either statewide, countywide or citywide median, **AND**
- Three (3) of the following four (4) conditions:
  - 80% of the land in project area has a non-seasonal unemployment rate at least 3% higher than statewide average
  - 80% of the land in project area has crime (violent or property offenses) rate at least 5% higher than statewide average
  - 80% of the land in project area has deteriorated or inadequate infrastructure i.e., sewer treatment, sidewalks, water supply, parks
  - 80% of the land in project area has deteriorated commercial or residential structures

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Completing the Pre-Application

5. Community Revitalization Investment Authority qualification (Cont'd)

- As alternatives to the criteria on the previous page, **EITHER** census tracts within project area are Disadvantaged Community census tracts as described in Section 39711 of the Health and Safety Code (per SB 535, CalEPA CalEnviroScreen)

OR

- Census tracts within project area are located on

TOC TIF Completing the Application

Part 2: Project Description and Stakeholder Engagement *(100 points)*

1. Project Description (30 points)
2. Zoning and Density (40 points)
3. Stakeholder Engagement (30 points)

TOC TIF Completing the Application

Part 2: Project Description *(30 points)*

1. Project Description

   a. Project Area/Targeted communities

   b. TIF District improvements to support increased Transit access and ridership based on existing or proposed development

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TOC TIF Completing the Application

Part 2: Zoning, Density, and Implementation *(40 points)*

1. Regulatory plan's policy goals that aligns with the 10 Characteristics of Transit Supportive Planning Toolkit
2. Environmental Clearance
3. Infill development potential

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TOC TIF Completing the Application

Part 2: Stakeholder Engagement *(30 points)*

1. Community and Stakeholder Support
2. Outreach Plan
3. Underserved Communities Engagement Process

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TOC TIF Completing the Application

Part 3: Staffing and Administrative Plan

1. Project Tasks, Schedule, and Budget
2. Project Management
3. Prior Grant Performance (if applicable)

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TOC TIF Completing the Application

- Application Form and Signature Page
- Attachment A – Tasks, Schedule, and Budget
- Attachment B – Task Description, Approach and Deliverables
- Maps of proposed project area

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Round 5 Timeline

- June 5: Application Package Released
- June 7, 20, 22 & 27: Application workshops
- July 31: Applications Due
- Late August – Staff Funding Recommendations
- Fall 2017 – Metro Board Approval
- Early 2018 – Grant Agreements Executed
  - 36-month performance period

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Lessons Learned

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Application Lessons Learned and Tips

Main project deliverable must be regulatory change

Proposed activities should be tied back to the overall regulatory plan

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Application Lessons Learned and Tips

Project titles should describe the project

The title will be on several documents and presented at meetings for years to come so make it clear

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Application Lessons Learned and Tips

Use the evaluation criteria to your advantage

Maximize points awarded by reviewing corresponding evaluation criteria closely when responding to questions

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Application Lessons Learned and Tips

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Follow the application instructions

Carefully review the instructions – we mean what we say

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Application Lessons Learned and Tips

5

Use the attachments provided

Do not alter the format or formulas

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Application Lessons Learned and Tips

Be concise in your responses

Avoid repetition and utilize the space provided

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Application Lessons Learned and Tips

Develop a reasonable budget

Applications will be evaluated on reasonableness and efficiency of proposed expenditures

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Application Lessons Learned and Tips

Don't forget about yourself

Staff labor is an eligible expense

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Application Lessons Learned and Tips

Plan for the unexpected

Develop realistic implementation schedules for tasks within the 36-month performance period

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Application Lessons Learned and Tips

Contact Metro staff early and often

Staff is available to answer questions and provide guidance to prospective applicants

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Thank You!

Desiree Portillo-Rabinov
Manager, Transportation Planning
213.922.3039
PortilloRabinovD@metro.net

Elizabeth Carvajal
Sr. Manager, Transportation Planning
213.922.3039
CarvajalE@metro.net

metro.net/projects/tod/
metro.net/projects/tod-toolkit/

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