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DECEMBER 23, 2019

TO: BOARD OF DIRECTORS

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CHIEF PLANNING OFFICER

**SUBJECT: TRANSIT ORIENTED COMMUNITIES DEMONSTRATION
PROGRAM LESSONS LEARNED REPORT**

ISSUE

At the direction of the Chief Executive Officer, the Joint Development department prepared and presented the Transit Oriented Communities (TOC) Demonstration Program (Program) to the Board in October 2015. The Program identified changes to the Joint Development process and established a "TOC Toolkit" to promote a more comprehensive approach to integrating transit in communities. The Program concluded with the Board adoption of the TOC Policy. However, TOC demonstration projects and initiatives carry on. Following Board adoption of the TOC Policy, staff committed to developing a "Lessons Learned" document of the Program to serve as a resource for Metro as well as our external partners and peer transit agencies.

DISCUSSION

The *Transit Oriented Communities Demonstration Program – Lessons Learned Report* reviews changes to programs and processes, new policies, and special projects that reflect Metro's commitment to realizing holistic, inclusive community development and land use planning along existing and proposed transit corridors.

While the report shares a vast array of TOC initiatives undertaken in the last several years, a few notable highlights include:

- Affordable Housing Policy Updates

In July 2015, Metro adopted a goal that 35% of all units built on Metro-owned land would be affordable to households earning 60% of area median income or less. At that time, Metro's Joint Development portfolio included 31% affordable housing units. As of November 2019, that percentage has increased to 34% affordable rental housing for completed projects, and 38% for projects in negotiations.

- **Community-driven Development Guidelines**
As part of an update to Metro's Joint Development Policy and Process, staff implemented a new approach that prioritizes and dramatically increases stakeholder engagement in producing Development Guidelines for Joint Development sites. Community-driven guidelines are critical in creating transparency as they clearly state community vision and goals for a site and establish accountability measures for how joint development proposals are evaluated against that vision.
- **Transit Oriented Development (TOD) Planning Grant Program**
Metro developed the TOD Planning Grant Program to spur the adoption of transit-supportive regulatory plans that advance thoughtful integration of land use and transportation planning with a goal of increasing transit ridership. Since inception, five rounds of grants totaling over \$25 million have funded transit-supportive plans for more than 90 station areas across Los Angeles County.

With these TOC initiatives, Metro is redefining the role of the transit agency to help enhance and stabilize communities across Los Angeles County. The *Lessons Learned* document captures key lessons from staff's efforts toward shaping vibrant, walkable communities around transit, using guiding principles of collaboration, partnership, transparency, and commitment to equity.

NEXT STEPS

Staff will promote the report within Metro and externally to ensure the lessons learned continue to inform the important work of developing inclusive, transit-oriented communities around Metro's growing system. Building on this foundation, in 2020 staff intends to revisit Metro's Joint Development policy to look at opportunities to further strengthen our commitment to addressing the deepening affordable housing crisis. In addition, staff is working with the TOC Policy Working Group, a subset of the Measure M Policy Advisory Council, on a TOC Implementation Plan for realizing TOC Policy goals in Los Angeles County through the following actions:

- Creating TOC corridor baseline assessments for all Measure M transit corridors
- Continually improving Metro's TOC programmatic areas
- Improving Metro's internal coordination to realize TOCs
- Strengthening coordination and collaboration with Metro's partners

The Plan will be finalized in early 2020 and brought to the Board for consideration in spring 2020.

ATTACHMENT

Attachment A – TOC Demonstration Program – Lessons Learned Report

Next stop: reimagining communities.

TRANSIT ORIENTED COMMUNITIES DEMONSTRATION PROGRAM Lessons Learned Report



Acknowledgments

A special thanks to all of the people and partners that worked with Metro on our TOC Demonstration Program, and to those who continue to work on our TOC efforts going forward.

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Introduction

Strengthening LA's Communities

LA County is home to 10.1 million people, a sprawling, vibrant metropolis spread over 4,084 square miles. With the county population projected to increase by another 2.3 million people over the next four decades, Metro has a tremendous opportunity to shape how the county will meet the demands of its growing population.

Walkable and bikeable neighborhoods with improved access to public transit offer a tangible way for Metro to help enhance the quality of life for Angelenos. With the launch of Metro's Transit Oriented Communities (TOC) Demonstration Program in October 2015, Metro has had the opportunity to showcase a holistic approach to considering the role of transit in shaping communities.

TOD

SINGLE DEVELOPMENT

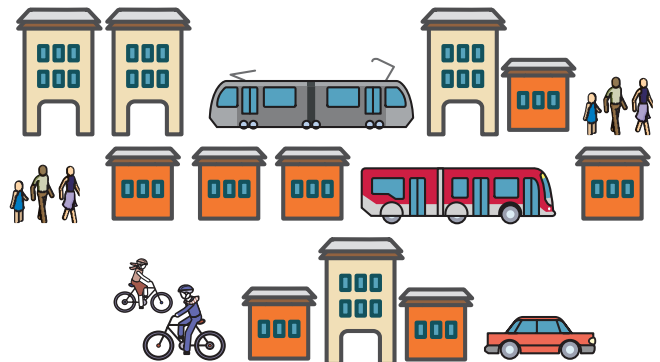
within 1/2 mile of transit



TOC

INTEGRATED COMMUNITY

served by transit with mix of uses



The Shift from TOD to TOCs

The concept of Transit Oriented Communities builds upon the idea of Transit Oriented Development (TOD). TOD is focused on community development that has a mixture of housing, office, retail and other commercial development. These amenities are integrated into a walkable and bikeable neighborhood that's located within a half-mile, or about a 10-minute walk, of quality public transportation.

By connecting people and amenities through improved access to public transit, TODs reduce car dependency, which lowers air pollution and greenhouse gas emissions; promotes walkable and bikeable communities that accommodate more healthy and active lifestyles; increases transit ridership and therefore revenues for transit operators; improves access to jobs and economic opportunities; and creates more opportunities for mobility.

With TOCs, Metro's vision goes beyond individual TOD projects to focus on the creation of compact, walkable and bikeable places in a community context, rather than concentrating on a single development site. That means expanding the boundaries to consider the impact of Metro's system over a one- to 1.5-mile radius around a transit station – and focusing on the transit corridor.

Moving from TOD to TOCs is a complex task involving multiple stakeholders at the local level. Metro has taken a leadership role in collaborating with local government, private developers, community-based organizations and other community members to make individual transit oriented developments and policies part of a vibrant built environment for existing and future residents to live, work, play and commute.

Sharing Lessons Learned

This report looks at the lessons learned during the three years of Metro's TOC Demonstration Program, from 2015 to 2018. As the lessons unfold, an important underlying context is the passage of Measure M in November 2016. Measure M is a no-sunset transportation sales tax that was resoundingly approved by more than 71% of LA County voters. The one cent sales tax is estimated to generate \$120 billion over the next 40 years, and will be used for new transit, highway and active transportation investments throughout the county.

The final section of this report discusses how the passage of this critical infrastructure investment plan has influenced and reshaped the concept of TOCs for Metro, and how Metro is moving forward to further expand its role in realizing Transit Oriented Communities.

The Road to TOCs: 1995–Present

The Early Years: Joint Development

Metro’s earliest work focused on individual TODs. The first major project was the development of Metro Headquarters, also called One Gateway Plaza, on the east side of Los Angeles Union Station. Completed in 1995, this project was developed through a separate authority, the Union Station Gateway Authority, and included the 650,000-square-foot commercial tower housing Metro’s Headquarters, as well as the Patsaouras Bus Plaza and East Portal to Union Station.

In the late 1990s, Metro’s Joint Development Program became active and focused on properties acquired for the Metro Red Line and Metro Purple Line heavy rail corridors. This led to the completion of the following projects:

- > Hollywood and Highland (2001)
- > Wilshire and Vermont (2007)
- > Hollywood and Vine (2009)
- > Hollywood and Western (2009)
- > Wilshire and Western (2000)
- > Westlake MacArthur Park Phase A (2012)

Other Joint Development projects were completed by the construction authority, which had the responsibility for delivering the Metro Gold Line rail corridor to Pasadena. Until the light rail line was completed and delivered to Metro for operation, the authority had the right to dispose of excess properties. Through the authority, the Del Mar and Sierra Madre Villa Stations saw Joint Development projects completed in 2007.

In addition to these sites, larger scale joint development occurred on Metro-owned lands adjacent to rail facilities, such as the Taylor Yards master development and One Santa Fe.

Measure R and the Great Recession

In 2008, LA County voters passed Measure R, a half-cent sales tax that would allow Metro to double the rail system by 2035 and invest in various additional bus rapid transit and highway projects. Metro recognized that this investment in the region’s transportation infrastructure would also provide an incredible opportunity to shape how LA County could meet the demands of its growing population, and Metro began the process of exploring how this investment can be leveraged beyond traditional transit projects and TOD.

While Measure R could have spurred additional Joint Development activities, it was passed concurrent with the start of the recession. From 2008 to 2012, Metro had many Joint Development sites active in negotiations. Most of these sites were land purchased for earlier construction of the Red and Gold Lines. However, during the recession the real estate market largely came to a standstill, and most of these projects were either completely canceled (North Hollywood Station) or negotiations were stalled indefinitely.

The Demise of Redevelopment

In 2011, interest in Joint Development began to pick up and Metro started to work on rebooting stalled projects, as well as soliciting proposals for new sites. Unfortunately, that year also saw the elimination of the California Redevelopment Law, which had two major impacts on Metro’s Joint Development Program. First, the development community and Metro were left without a source of public gap financing that could support various community goals, such as affordable housing, community-serving arts and cultural spaces, and related infrastructure improvements around station areas. Secondly, developers, civic leaders and community stakeholders started looking to Metro’s Joint Development Program as a means to replace the public/private real estate transactions and community development goals previously realized through Redevelopment.



Map of TOD Planning Grant Program Awards in LA County

Planning for Transit Expansion

With the elimination of Redevelopment and tax increment financing, and cities in the depth of the recession, there was no dedicated funding for cities to update land use plans. With Measure R doubling the rail system, Metro saw a need to ensure that land use plans around station areas could incentivize and meet the growing demand for TOD. So, in 2011, Metro developed the TOD Planning Grant Program to spur the adoption of transit-supportive regulatory plans that advance thoughtful integration of land use and transportation planning with a goal of increasing transit ridership. Since 2011, five rounds of the grant totaling \$23.8 million have funded 41 land use plans in cities across LA County. These plans are impacting the land use around 86 Metro, Metrolink and Bus Rapid Transit Stations.

Market Rebounds and Joint Development Expands

By 2014, the market was back in full swing. Numerous Measure R transit projects were in construction, and the public and private sectors were committed to focusing growth and development around transit stations. Community stakeholders and Metro's board members and senior leadership began to request a more aggressive Joint Development Program, with particular focus on several vacant parcels in Boyle Heights, as well as new sites on the under-construction Crenshaw/LAX transit corridor.

Along with this renewed interest in Joint Development was a furthering of the idea that Metro needed to step in and fill the leadership void left by the elimination of Redevelopment. There was a growing expectation that the Joint Development Program should take a more expansive view on realizing community development goals on Metro-owned land, and more broadly address growing gentrification pressures across LA County.

In 2014, there was also a change in leadership and staffing of the Joint Development Program. While many transit agency Joint Development programs are run by real estate staff who also manage land acquisition, relocation, property management and short-term leases, the Joint Development



Eastside Access Improvements

team took a different approach and brought in professionals with backgrounds in redevelopment, community development and affordable housing. This more expansive focus and new leadership started a shift to the concept of Transit Oriented Communities. Early examples of this expanding role of the Joint Development Program and other Metro planning efforts include:

> **Crenshaw/LAX Joint Development Strategic Plan:**

Completed in June 2015, this plan explored opportunities for partnerships between Metro and other public agency landowners (for example, LA City and LA County), as well as the feasibility of smaller Metro-owned sites along the Crenshaw/LAX rail corridor.

> **Affordable Housing:** In November 2014, the Metro Board directed staff to identify options for increasing Metro's role in the creation of affordable housing near transit. This motion resulted in the affordable housing policies included in the updated Joint Development Policy (July 2015), as well as Metro's \$9 million investment in the Metro Affordable Transit Connected Housing (MATCH) loan fund to help preserve and expand affordable housing stock.

> **Eastside Access:** In November 2009, the Metro Gold Line Eastside Extension began operations, providing residents and businesses in Boyle Heights and East Los Angeles with light rail transit service and connecting the community to job centers and exciting destinations throughout LA County. Metro collaborated with Council District 14, the City of Los Angeles and a community advisory committee to create better pedestrian and bicycle access to four stations in the Boyle Heights community: Pico/Aliso, Mariachi Plaza, Soto and Indiana. Creative design elements that reflect the culture, history and heritage of the community were integrated into the station areas and access has been improved with pedestrian and bicycle enhancement projects that incorporate landscaping, lighting and other artist-influenced and designed transit enhancement elements. This community enhancement and access project was made possible through funding from Measure R, the half-cent sales tax.

The focus on access improvements to stations helped lay the groundwork for Metro's First/Last Mile Strategic Plan in 2014, which studied how riders get to and from stations by walking, cycling, or using other active modes.

Next stop: transit-oriented communities.

From 2011 to 2014, there was a growing acknowledgement that Metro plays a critical role, not only in shaping communities, but in expanding economic opportunities by improving access to the transit system. As an agency, Metro had many discussions around land use and equity. The appointment of Phil Washington as Metro's CEO in 2015 marked the culmination of this movement to more holistic thinking

about the role of transit in communities. Under Washington's direction, the TOC Demonstration Program launched in October 2015. Led by the Joint Development team, but reliant on coordination across Metro departments, this program brings a broader community development focus to all aspects of TOC work and explores opportunities to expand how Metro can enable and incentivize municipal and other partners to realize TOCs.

Joint Development Projects



Hollywood and Highland



1st and Boyle



Hollywood and Western



Wilshire and Vermont



One Santa Fe

Photo: Urban Land Institute

The TOC Demonstration Program

What It Is and What It Does

Metro's TOC Demonstration Program had two main components:

- > A recalibration of the Joint Development Process, focused on active collaboration with community stakeholders and local jurisdictions; and
- > Building a "TOC Toolkit" that draws upon an array of creative community development tools to support Joint Development projects in achieving broader TOC goals.

The program's goals included:

- > Demonstrate successful TOCs
- > Test an expanded role for Metro in the creation of TOCs
- > Focus on stations with catalytic potential along a transit corridor and the greatest opportunity for success
- > Collaborate with local stakeholders to identify opportunities to broaden the impact of individual projects to a one- to 1.5-mile mile radius around stations
- > Learn from a diversity of project types and individual project goals
- > Allow sufficient time for implementation (three to five years)

Program Sites and Projects

Seven projects and development sites were selected to showcase progress, with an eighth site added by the Metro Board of Directors in 2016.

- > Golden State Specific Plan
- > Crenshaw/LAX Line Joint Development Opportunities
- > Duarte Station Redevelopment Opportunity
- > El Monte Station Joint Development Opportunity
- > North Hollywood Station Joint Development Opportunity
- > Connect US Action Plan
- > Willowbrook/Rosa Parks Station Improvement Project
- > Wardlow Station Redevelopment Opportunity

During the TOC Demonstration Program, from 2015 to 2018, staff provided quarterly updates on the progress of these eight sites. Because the program spanned only three years, and because many of these efforts are longer term, each project does not offer its own set of lessons learned. Lessons learned from each site are woven into the sections that follow, as each site or program provided creative opportunities to realize TOCs.

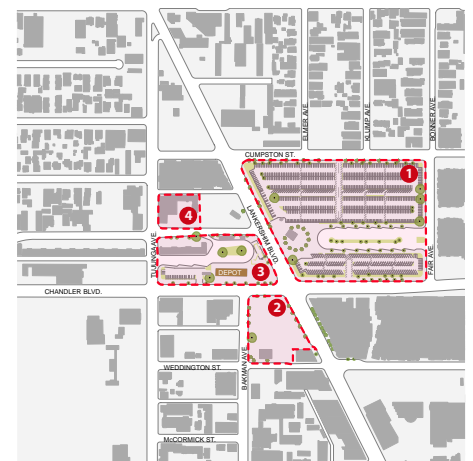
All TOC Demonstration Program quarterly reports can be found at metro.net/toc under TOC Demonstration Updates.



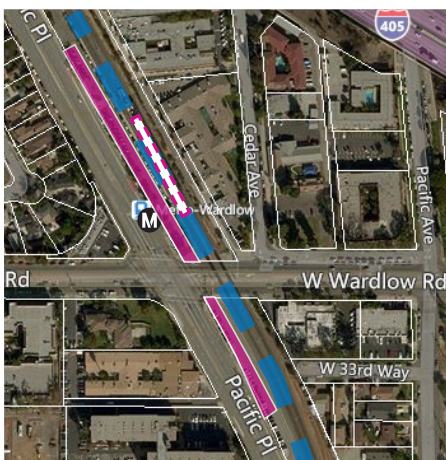
Crenshaw/LAX Line Joint Development



Duarte Station Redevelopment



North Hollywood Station Joint Development



Wardlow Station Redevelopment



Willowbrook/Rosa Parks Station Improvement

Joint Development Program

What We Did and What We Learned

To realize Transit Oriented Communities, the Joint Development team re-evaluated its policies and process, looking at everything from the creation of development guidelines and how communities and jurisdictions are engaged, to regular communications updates and a suite of affordable housing policies.

Joint Development Policy Updates

During the Demonstration Program, the Joint Development Policy was updated to clarify priorities and process, commit to meaningful stakeholder engagement, ensure that inclusive programs create opportunities for small and minority businesses and developers, open up avenues to innovation, and embrace new affordable housing policies.

Affordable Housing Policy Updates

The 35% Goal

Metro adopted a goal that 35% of all units built on Metro-owned land would be affordable to households earning 60% of area median income (AMI) or less. When the Demonstration Program was launched, we had a portfolio in which 31% of the housing units were affordable. As of November 2019, the Joint Development portfolio is at 34% affordable rental housing for completed projects, and 41% for projects in negotiations.

This increase in affordability is significant given the elimination of Redevelopment and the continuing reduction in federal funding sources for affordable housing, most prominently the CDBG and HOME funding programs. While some new affordable housing subsidies have been developed since 2011, most notably California's Affordable Housing and Sustainable Communities (AHSC) program, as well as the passage of Measure HHH in the City of Los Angeles and Prop H in LA County, none of these fully account for the loss of prior existing funding provided by Redevelopment and tax increment.

Discounted Ground Lease

The Joint Development Policy provided that, where appropriate, and subject to Federal Transit Administration (FTA) approval (if applicable), Metro may discount joint development ground leases below fair market value in order to accommodate affordable housing with an income target of, or less than, 60% of AMI. Such a land discount may not be greater than 30% of the fair market value.

Since adoption of this policy, Metro has completed one joint development negotiation that used this discount. In December 2017, the Metro Board of Directors approved the terms for a ground lease that provides a 42% discount to fair market value for a 100% affordable housing project. This project resulted in a discount above the maximum 30% because the developer reduced the affordability levels from 30% – 60% AMI to 30% – 50% AMI in response to stakeholder input. Several additional affordable housing projects are currently in negotiations and will likely seek discounts.

Labor and Construction Policies

At the January 2017 meeting, the Metro Board of Directors adopted an update to the Project Labor Agreement (PLA) and Construction Careers Policy (CCP), which extends the program for another 10 years. Included in the amended policy was an application of the PLA and CCP policies to Joint Development projects with at least 60 units of housing and/or 40,000 square feet of retail. Application of this policy to the Joint Development Program continues Metro's commitment to ensuring that projects maximize benefits to lower-income and disadvantaged communities by offering career and economic opportunities.

Unsolicited Proposals Policy

Launched in 2017 alongside the broader Metro Unsolicited Proposals Policy, this policy creates a clear process for Metro to receive and consider proposals outside the traditional request for proposals (RFP) process. As of November 2019, Metro has received nine unsolicited proposals. One of the proposals has moved into exclusive negotiations, four are still under review, and four were determined to be infeasible.

The unsolicited proposals process has allowed for flexibility to respond to market opportunities, in particular to partner with developers that bring adjacent properties to the table and therefore create a larger impact than would be possible on Metro-owned land alone.

Case Study: Advocating for Affordable Housing at the Federal Level

When property was acquired for a transit project that included federal funding, the Joint Development Program must follow the guidance of the FTA as detailed in the Joint Development Circular (C7050.1A), and the FTA must formally concur on the terms and scope of Joint Development projects prior to Metro executing a ground lease with a developer. The circular, published August 2014, allows for a discount to the ground lease for a site that supports community services or publicly-operated facilities. However, the section did not explicitly mention affordable housing as a community benefit. Metro worked with Enterprise Community Partners and California's Housing and Community Development department to urge the FTA to clarify their definition and include affordable housing. On December 29, 2016, the FTA published Federal Register vol 81, No 250, which added this clarification.



Cesar Chavez/Fickett Proposal Rendering (Abode Communities 2017), 60 apartment units of affordable housing

Joint Development Process Updates

In addition to the policy updates that have been described, new processes were put in place to ensure meaningful engagement of stakeholders throughout the Joint Development process, and to realize broader TOC goals.

Process Clarification

One of the first steps Metro took was to clarify the process for initial studies, community engagement, competitive procurement and ensuing negotiations. Clarifying the process serves to create transparency with all interested stakeholders, from the communities that have Joint Development projects to development teams interested in participating in the program, and Metro staff and the Board.

Development Guidelines

For development guidelines, which are a precursor to issuing a Joint Development Request for Proposals, Metro implemented a new approach that dramatically increased stakeholder engagement to produce guidelines that reflected community vision and values. Staff also brought in outside urban planning/design and financial consultants to help ensure the design and financial feasibility of realizing that vision. Through creative community engagement activities, stakeholders are able to understand trade-offs and prioritize community benefit objectives.

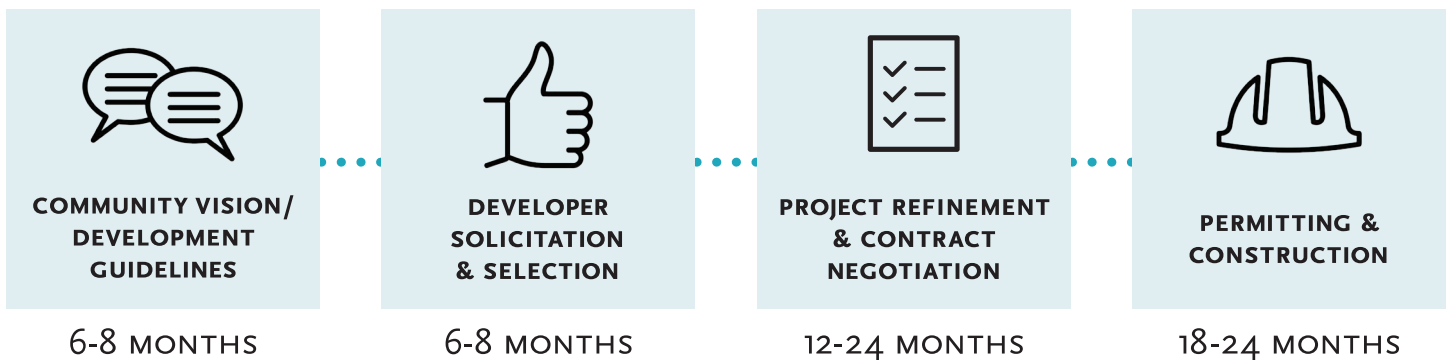
The creation of new development guidelines opens opportunities for both dialogue and accountability in the Joint Development process. The guidelines are critical in creating transparency as they clearly state the vision and goals for each site and establish accountability measures for how joint development proposals are evaluated against that vision. Guidelines also create clarity for developers as to what Metro, the local municipality and community stakeholders wish to see on the site, which mitigates entitlement risk.

During the Demonstration Program, development guidelines were created for various projects, including the 15.6-acre North Hollywood Station (December 2015), Expo/Crenshaw Station (June 2016), Mariachi Plaza Station (February 2017), Cesar Chavez/Fickett site (February 2017) and Division 6 (June 2019). Meaningful stakeholder engagement efforts leading to the creation of these guidelines ensured broad support, with all guidelines being adopted by the Metro Board and resulting in successful RFPs and developer selection (Division 6 Request for Interest/Qualifications, or RFI/Q, release is pending).

Design Review Process

For many years, Joint Development projects underwent a design review that was typically limited to input from various Metro departments and focused on avoiding impacts to transit facilities or operations. With the Demonstration Program, Metro launched a design review process that addresses these issues, as well as more comprehensively consider the quality of the design, architecture and aesthetics of developments on Metro-owned property. The new process also reflects the recommendations of the Metro First/Last Mile Strategic Plan active transportation goals as well as Metro's Sustainability Policy. In some cases, the new process includes a stakeholder design review committee.

All active Joint Development projects are now subject to design review, offering another checkpoint to identify opportunities for the proposed development to contribute to promoting connectivity between transit, real estate development and broader TOC goals.





Design Charrette, Boyle Heights



Community Workshop, Boyle Heights

Case Study: Be Willing to Start Over

In October 2014, Metro staff recommended that the Board enter into an Exclusive Negotiating Agreement with a developer for the Metro-owned land at Mariachi Plaza Station in Boyle Heights. Staff believed this recommendation was in line with development guidelines that had been created for the site three years earlier, but learned differently when over 40 community members showed up to protest the recommendation, followed by community rallies and press events denouncing Metro's Joint Development process.

Having just secured new leadership, Metro's Joint Development team took this as a moment to pause and consider the circumstances that led to this conflict. After arranging one-on-one meetings with key community leaders, attending the Boyle Heights Neighborhood Council and holding a Town Hall with over 300 attendees, Metro decided to start over with the Joint Development process. The new Mariachi Plaza Development Guidelines were adopted by the Metro Board of Directors in February 2017. All public comment was in support of both the guidelines and Metro's new transparent process, and an RFP was released the following month.

Metro is currently in negotiations with the East Los Angeles Community Corporation for the development of 60 affordable housing units, a 2,000-square-foot Mariachi cultural center, a 6,000-square-foot community garden and over 6,000 square feet of community serving retail.

The events around Mariachi Plaza caused Metro to reflect upon and reconsider how development guidelines are created for Metro's Joint Development sites. The result has been a deeper commitment to meaningful community engagement – and an approach that is informing other work across the agency.



Building Partnerships Little Tokyo

Building Partnerships Events

Metro values the benefits of collaboration, as well as the diversity and strength of LA County's small business community. That's why the updated Joint Development Policy states Metro's preference for developer teams that include community-based organizations (CBOs), small/disadvantaged business enterprises (SBE/DBEs) and disabled veteran business enterprises (DVBES).

To support this effort, Metro's TOC team launched the Building Partnerships Event. Modeled after the "Meet the Primes" program, which connects Metro-certified small businesses with larger prime contractors, these events offer networking opportunities for local, small and large developers; CBOs; SBE/DBE/DVBE contractors; and any others who would be interested in forming teams to respond to Joint Development RFPs.

The events are held well in advance of the release of an RFP and pre-bid conference, allowing real estate development teams enough time to form meaningful equity partnerships. The first two Building Partnerships events were held in June 2016 in support of anticipated RFPs for two Joint Development sites on the Metro Crenshaw/LAX Line. More than 150 people attended the two events. A similarly structured event was held as part of the November 2017 Los Angeles Union Station Master Commercial Developer Industry Forum, with over 200 participants, and another was held in June 2018 in support of the anticipated Little Tokyo/Arts District Regional Connector Station RFI/Q. That event attracted over 100 participants.

Communications Outreach

Recognizing that robust communications underlies the success of any project, Metro's TOC team made a concerted effort to offer regular updates and information to interested stakeholders and developers. New tools included:

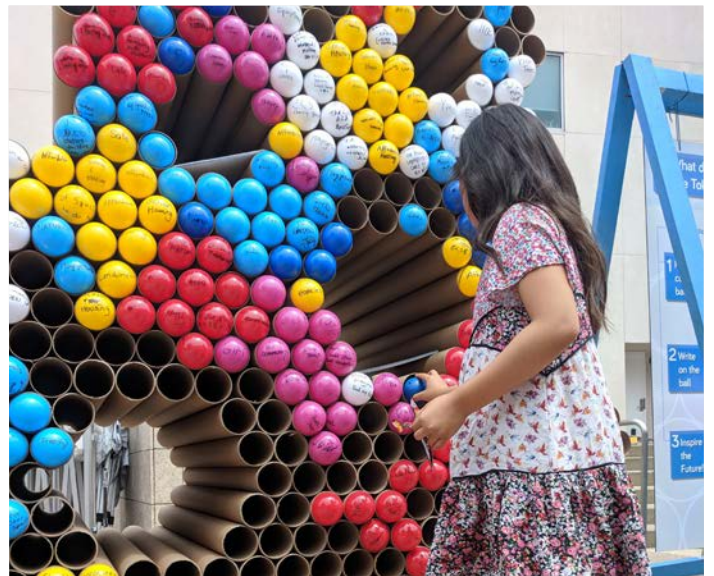
- > **Updated webpage:** The Joint Development webpage was updated, offering project pages and a new interactive map of sites.
- > **Stakeholder database:** A new database was created that lets stakeholders choose to be updated on all Joint Development activities or pick to receive project information by geographic area.
- > **Quarterly newsletter:** Participants who sign up for the Joint Development database receive a quarterly newsletter with updates on project milestones, as well as information on upcoming meetings, contracting opportunities and RFPs.
- > **Regular e-blasts:** Stakeholders now receive regular e-blasts based on their chosen information preferences. These e-blasts provide updates on projects, including community meetings, Metro Board of Directors actions and other key milestones.



Fairview Heights Joint Development Workshop, Inglewood



First/Last Mile Bike to the Beach Pop Up, Downtown Long Beach



Interactive Installation for Little Tokyo/Arts District Station Halfway There! Event



Venice Farmer's Market Pop Up for Division 6 Joint Development



North Hollywood Joint Development Workshop at Groundwork Coffee in Lankershim Depot



First/Last Mile ¡Ride On Slauson! Pop Up, Florence-Firestone



Little Tokyo Community Leaders Focus Group

The best way to meet the needs of the communities we serve is to first ask and then listen to their needs, hopes and vision.



Community Workshop for Mariachi Plaza Station, Boyle Heights

JOINT DEVELOPMENT LESSONS LEARNED

Start with the basics

During the course of the TOC Demonstration Program, Metro updated the Joint Development Program's policies and process, aligning them with broader agency goals, as well as creating the infrastructure for the program to offer transparency and consistency.

Embrace transparency, dialogue and regular communication

In creating holistic communities, process is an important part of the outcomes. Inclusivity, transparency and regular communication are critical, along with accountability checkpoints along the way. Stakeholders understandably expect to be updated and informed throughout the process of soliciting and negotiating a project. The best way to meet the needs of the communities Metro serves is to first ask and then listen to their needs, hopes and vision.

Make priorities clear and follow up appropriately

During the Demonstration Program, Metro committed to clear and aggressive affordable housing goals, and stated a commitment to more diverse and inclusive development teams. Policies such as the Affordable Housing goals, discounted ground lease and the PLA/CCP, as well as outreach efforts such as the development guidelines process and Building Partnership events, were put in place to realize these priorities. Finally, emphasizing the role of quality design in realizing multiple TOC goals is elevated with the new design review process.

Commit to meaningful community engagement, at the beginning, middle and end

A truly transparent process requires engagement efforts that are meaningful rather than just "checking the box." Through deeper and more creative engagement, Metro can learn a community's needs, which strengthens relationships and builds stakeholder trust – and then follow up with regular updates and easy availability of information. This kind of engagement can be realized by engaging community-based organizations in the design and implementation of project-specific outreach, as will be discussed in the next section of this report.

TOC Initiatives

What We Did and What We Learned

Metro's TOC Initiatives represent the "kitchen sink" of ideas that emerged as the TOC team used existing programs and responded to opportunities and partnerships that stretched Metro's role in building and incentivizing complete communities centered on transit. To realize Transit Oriented Communities, the Joint Development team re-evaluated its policies and process, looking at everything from the creation of development guidelines and how communities and jurisdictions are engaged, to regular communications updates and a suite of affordable housing policies.

More than a set of identified tools, these TOC Initiatives are opportunities to realize TOC goals across land use policies, agency partnerships (public and private) and creative financing strategies, including the identification of grants and other funding options. These programs span across Metro departments.

As the Demonstration Program progressed, staff identified additional strategies that supported the realization of Metro's TOC goals. Below are examples of TOC Initiatives at work, as realized in specific projects and programs. Each of these examples reflects Metro's efforts to step outside the traditional work of a transit agency and find ways to innovate, incentivize and sometimes directly fund a broader set of community development and land use goals.

Public Funding Coordination

Grant Assistance for Active Transportation Grants

In February 2016, the Metro Board of Directors adopted a Grant Assistance Program developed by the State Legislative Analysis and Discretionary Grants unit of Countywide Planning. This program pays for a grant writer to assist eligible applicants when applying for the statewide Active Transportation Program (ATP). Between 2014 and 2019, the program submitted 119 grant applications and secured nearly \$234 million in funding for 21 cities and LA County.

MATCH Loan Fund

In September 2016, Metro and its foundation partners launched the Metro Affordable Transit Connected Housing (MATCH) Loan Fund. MATCH is a public-private lending partnership with an estimated loan capitalization of \$75 million, leveraged with an \$18 million combined investment from Metro, the California Community Foundation, the California Endowment and the Weingart Foundation. Metro’s goal with this program is to deliver innovative financing that targets preservation and stabilization of naturally occurring affordable housing that’s near existing and proposed transit nodes in LA County, as well as the development of new affordable housing.

Government Agency Joint Ventures

Expo/Crenshaw Site

The Expo/Crenshaw site is one of the eight TOC Demonstration Program sites. This joint development opportunity includes two sites at the intersection of the Expo and Crenshaw/LAX Lines: a county-owned Probation Department facility on the southwest corner of Exposition and Crenshaw Boulevards, and a Metro-owned site on the southeast corner. LA County arranged to vacate the Probation Department facility and partnered with Metro to jointly solicit development of the two properties. After an extensive, eight-month community engagement process that created development guidelines for the site, Metro and LA County issued an RFP and ultimately selected Watt Companies, which has since partnered with West Angeles Community Development Corporation, as the development team for the site.

This Joint Development project offers an excellent example of public agencies cooperating and bringing their resources to the table to maximize impact and community benefits.



Expo/Crenshaw Site Map

EcoRapid TOD Planning Pilot Program

The West Santa Ana Branch (WSAB) Corridor is a Measure M-funded 20-mile transit corridor that's currently in the planning and environmental stages. This corridor will serve 13 cities, all of which are considered disadvantaged communities. In 2016, Metro partnered with the City of South Gate and EcoRapid Transit, a Joint Powers Authority serving the WSAB cities to secure a \$2 million grant from the FTA's TOD Planning Pilot Program. Metro funded a grant writer and supported the writing of the application. The grant-funded work was completed in May 2019 and produced a TOD Strategic Implementation Plan for each of the cities that will be served by the West Santa Ana Branch rail line. The plan includes suggested land use updates, active transportation improvements, infrastructure investments, economic development strategies and public financing opportunities at the corridor-wide and station-area level.

Union Station/Civic Center Exploratory Taskforce

In November 2016, the Metro Board of Directors approved a motion directing the formation of an Exploratory Taskforce consisting of Metro, the California High Speed Rail Authority, LA City, LA County and community stakeholders. The taskforce will: (1) formally coordinate planning and infrastructure investments occurring in the area; (2) identify potential revenue generation/value capture opportunities and partnerships necessary to pursue such opportunities; (3) engage stakeholders to develop an inclusionary approach to district-wide efforts; and (4) ensure equitable distribution of benefits. In support of this effort, Metro secured a \$375,000 SCAG Sustainability Planning Grant. This grant will fund compensation for community-based organizations (CBOs) to support prioritization of infrastructure investments, as well as a feasibility study for formation of a tax increment financing district.

Small Business Loan Fund

In August 2016, Metro and the Los Angeles County Development Authority (LACDA, formerly the County of Los Angeles Community Development Commission) executed a Memorandum of Understanding for implementation of the TOC Small Business Loan Program. Metro is investing \$1 million in a loan fund to support the location of small and local businesses on vacant and underutilized properties near High Quality Transit Stops. LACDA is the lead for program implementation.

Active Transportation Improvements

First/Last Mile Planning

Following the award-winning First/Last Mile Strategic Plan, adopted by the Metro Board of Directors in 2014, the Metro Board approved a comprehensive slate of activities for first/last mile planning and implementation in 2016. These include integrating first/last mile planning and implementation as part of future transit capital projects and assisting local agencies in implementing projects through a grant matching and technical assistance program. This effort is ambitious and unique for a transit agency to look beyond the station footprint and explores safe pathways to transit within a half-mile walkshed and three-mile bikeshed of a station.

Connect US Action Plan

This plan is one of the eight TOC Demonstration Program sites, and Metro has developed a public improvement plan identifying bicycle and pedestrian linkages between Union Station and surrounding communities, including El Pueblo, Little Tokyo, the Arts District, Chinatown, Civic Center, Boyle Heights and portions of the Los Angeles River that surround Union Station. Completed in 2015, the plan identifies and prioritizes projects to create a connected walkable and bikeable network. Metro and LA City are working to implement the plan, with the city adopting it as part of their new Mobility Element. The joint project has also secured \$60 million in grant funding toward implementation of prioritized projects.



Connect US Action Plan Sketch, Alameda Esplanade



TOD Planning Toolkit: 10 Elements of Transit-Supportive Places

Transit-Supportive Land Use Planning

Transit-Supportive Planning Toolkit

Funded by a grant from the state’s Strategic Growth Council, the Transit Supportive Planning Toolkit is a resource to advance development that promotes equitable access, sustainable practices, and transit-supportive places and infrastructure. The toolkit provides municipalities with best practices and case studies for resilient and transit-supportive land uses across a variety of neighborhood typologies. The research-based toolkit identifies 10 elements of transit-supportive places that, when advanced collectively, can improve the reduction of vehicle miles traveled and increase transit ridership. The toolkit is available online at metro.net/projects/tod-toolkit.

TOD Planning Grant Program

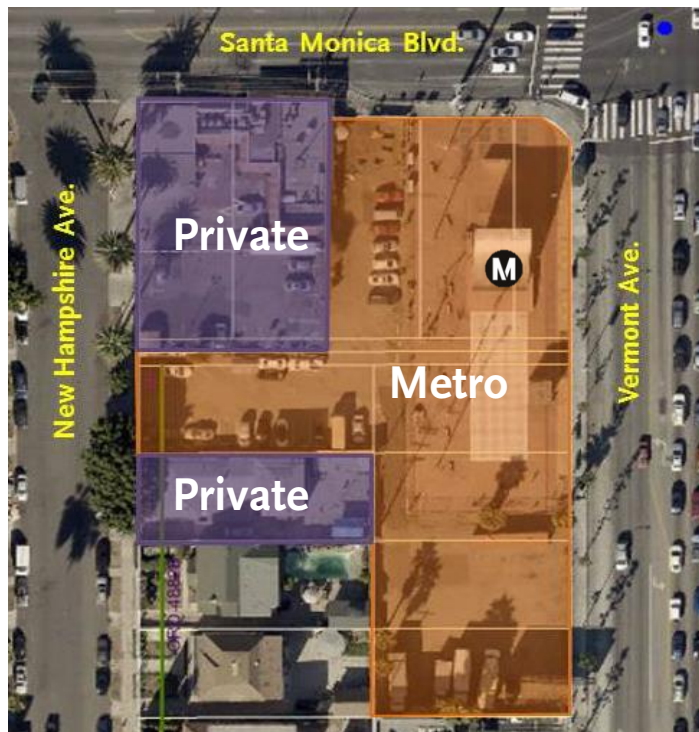
As highlighted previously, the TOD Planning Grant Program provides funding for local jurisdictions to develop transit-supportive land use plans and remove regulatory barriers to TOD. Funded plans include updates to general plans, specific plans, overlay zones or other planning tools. The grant also funds the environmental processes required to adopt the plans.

Golden State Specific Plan

This plan is one of the eight TOC Demonstration Programs and was funded by Metro’s TOD Planning Grant Program. It is a joint effort by the City of Burbank and the Burbank-Glendale-Pasadena Airport Authority to implement land use recommendations from an earlier Metro-funded study on land use and transportation access around the Hollywood Burbank Airport. The plan has been largely completed during the course of the Demonstration Program. Project elements have included outreach and engagement, market analysis, existing conditions studies, streetscape plans, and initial development of conceptual frameworks for the three alternative approaches to urban design, land use and transportation that will be included in the final plan.

Adjacent Property(ies) Inclusion

In January 2017, Metro received an unsolicited proposal for the Vermont/Santa Monica Station from Little Tokyo Service Center (LTSC), a nonprofit developer. The proposal included both Metro-owned land and adjacent land purchased by LTSC. In November 2017, an interdisciplinary team completed its review of the proposal and published Metro’s interest in development of its property at the station. In March 2018, the Metro Board of Directors approved entering into an Exclusive Negotiations and Planning Agreement with LTSC for the development of 160 affordable housing units. In 2018, Metro received two additional unsolicited proposals for Joint Development projects, both of which include adjacent properties.



Vermont/Santa Monica Site Map

Community-based Organizations

In October 2016, the Blue Line First/Last Mile Plan was launched, employing the study techniques of Metro’s First/Last Mile Strategic Plan to the 22 stations on the Blue Line. In addition to being the first comprehensive first/last mile planning exercise for the Metro system, the plan piloted a new and innovative approach to community engagement by involving a coalition of community-based organizations (CBOs) as part of the project team. Further, project engagement was built around fun, interactive activities and events in the communities surrounding the Blue Line stations. This was intended to facilitate broad participation as well as to counteract fatigue and lack of credibility around public agency planning processes along the Blue Line corridor.

The plan was successful in meeting its objectives and further served as a platform for community-based voices on a range of related issues affecting travel and the use of transit, including housing, displacement/gentrification and security/policing. All of these issues are captured in the plan, and written in the voice of Metro’s community partners. This effort is an early example of new techniques for integrating meaningful community participation in Metro projects, to be developed further as part of the Equity Platform.

Since adoption of the Blue Line First/Last Mile Plan in February 2018, Metro has provided grant and technical assistance to five jurisdictions to prepare grant applications in support of identified pathway projects. In September 2018, six applications were submitted totaling over \$100 million in funding requests. In addition, the Metro Community Relations team is building on this work and developing a Metro Community-based Organizations Partnering Strategy.

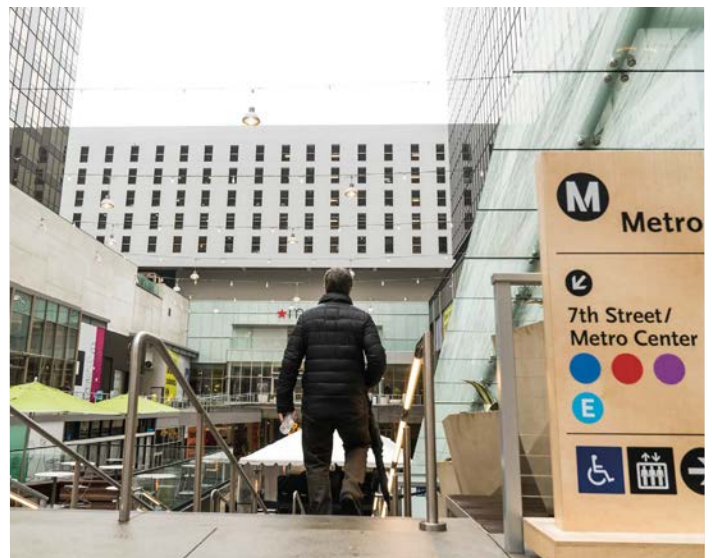
Station Integration

The Bloc/Metro Connection

This project provides a direct connection from Metro’s busiest rail station, 7th/Metro Center, to a renovated mall in the heart of downtown LA, known as “The Bloc.”

The original Metro station was designed with underground “knockout panels” that could be removed to connect the station with neighboring uses. For The Bloc/Metro Connection, Metro activated one of these panels and built a 12-foot-long tunnel to complete the passageway into the private development, then used escalators and elevators within the shopping center to move patrons to street level.

The connection opened to the public in February 2017 and was completed for a fraction of the cost of a new station entrance, as Metro shared the cost with the private developer. This unique project serves as Metro’s first subway-to-shopping connection, integrating Metro’s services into the urban fabric of downtown Los Angeles and increasing Metro’s visibility to potential riders.



The Bloc at 7th/Metro Center

Go Ave 26 Pilot Project

In 2017, LA-Más, a nonprofit urban design firm based in northeast LA, was awarded a Transit Center grant to improve access to the Gold Line’s Lincoln/Cypress Station.

The project was rooted in a community outreach and engagement process that determined the project’s scope, design and implementation. LA-Más worked with various Metro departments in the project’s early phases, including the Communications department (signage and environmental graphic design), the Office of Extraordinary Innovation and the First/Last Mile planning team. In addition, LA City and Caltrans were engaged to develop the end product.

In August 2017, LA-Más unveiled the results of this interagency and community engagement process, with the Go Ave 26 Pilot project. Go Ave 26 supports pedestrians and public transit users around the transit hubs of Avenue 26. LA-Más produced a series of temporary design installations including: seating and shading in nearby Lacy Street Neighborhood Park; wayfinding signage that points to the Metro station, bus stations, and local amenities; murals on the underpass walls which create a sense of play and light; and patterns on the sidewalk, fences and poles that reclaim space for pedestrians and indicate clearer pathways.



Go Ave 26

Photo: LA-Más, Jon Endow

The Platform LA

In June 2019, the Platform LA celebrated the opening of a new public space at the southwest corner of National and Washington Blvds on a Metro-owned property adjacent to the Downtown Culver City Metro Station. The Platform LA is a creative office and retail center, known for its beautifully landscaped network of outdoor plazas and pedestrian alleyways. Metro worked closely with the owners of Platform LA to transform an empty lot below the Expo Line guideway into an outdoor space for the community that will help link the Metro Station to the neighborhood. The new space is an inviting space to read a book, eat lunch or socialize with friends before catching a train. Metro is proud of this partnership and hopes it will inspire more creative collaborations to come with the development community to enliven underutilized public land to better serve communities.



The Platform LA

Transit Parking Management (Reduce, Relocate or Consolidate)

As part of the preliminary feasibility studies for the joint development of Metro and LA County-owned properties at the Expo/Crenshaw Station, Metro identified an opportunity to make the Metro-owned site at the southeast corner of Crenshaw and Exposition Blvds more feasible for community-serving uses.

The site was originally slated for 110 surface parking spaces. That meant any new development would have to replace that parking, likely by putting it underground, which would come at a considerable expense. Such an expense would potentially have a dramatic impact on the opportunity to offer affordable housing and community-serving uses and/or transit betterments at the site.

Working closely with Metro's construction team and the FTA, the Joint Development team secured FTA approval to provide the 110 parking spaces at a parking structure that's located one block away from the station. The structure belongs to the West Angeles Cathedral and is currently leased by Metro for patrons accessing the existing Expo Line. With this new joint development project, Metro is studying potential improvements to the one block connecting the transit stations and the parking structure.



Expo/Crenshaw Parking Consolidation

Technical Studies and Feasibility Assistance

A key role that Metro can play, and one that takes relatively little funding (though a commitment of staff resources), is to provide technical studies and feasibility assistance to cities and other municipal entities. Examples can be found in two of the TOC Demonstration Program sites.

Duarte/City of Hope Station (Gold Line)

In 2015, the City of Duarte completed the Duarte Station Specific Plan. This plan identified several privately owned properties, primarily with low-intensity industrial uses, for redevelopment of higher-density residential and commercial uses. Metro procured a financial consultant to complete a market study and financial analysis of the opportunity sites, identifying necessary conditions that would spur market interest in redeveloping the properties.

Wardlow Station (Blue Line)

In May 2016, the Metro Board of Directors adopted a motion directing staff to pursue various studies relating to the safety and state of good repair of Wardlow Station in the City of Long Beach. The motion also directed inclusion of the Wardlow Station in the TOC Demonstration Program. Metro consultants completed a feasibility study to advise the City of Long Beach on opportunities to reposition privately owned properties surrounding the station. The final report was delivered to City of Long Beach staff in December 2017.

Pilot Programs

In June 2017, Metro released Round 5 of the TOD Planning Grant Program, and within this round launched the TOC Tax Increment Financing (TIF) Pilot Program. This pilot program was developed with input from SCAG and the LA County Office of the CEO. It will fund feasibility studies for municipalities interested in pursuing TIF districts around transit stations. With this program, Metro is providing technical assistance and capacity building to ensure that cities served by Metro's transit system can implement TOC-friendly policies and programs on their own.

The ATP grant assistance program described earlier in this section is another example of this kind of technical assistance that can leverage broader impacts and build capacity.



Metro Transfers Design Guide

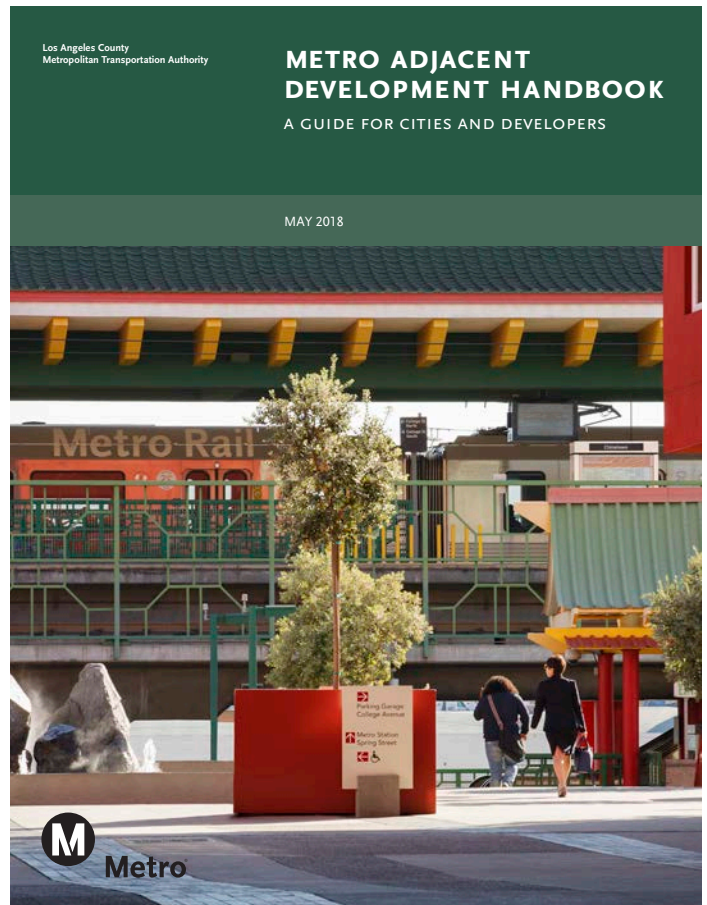
Reference Guides

To empower local jurisdictions and the development community, Metro has prepared resource documents to educate stakeholders on Metro’s needs and best practices to encourage partnership around transit.

Transfers Design Guide

Nearly two-thirds of Metro’s patrons transfer as part of their transit journey. Completed in 2018, the Metro Transfers Design Guide is a best practices document with recommendations on improving connectivity between Metro and other transit providers. The guide also contains recommendations on enhancing the transit environment, for example, sidewalks, streets and stations, to ensure that transfers are safe, convenient and comfortable.

This document will serve as a resource for Metro staff, other transit providers and local jurisdictions to inform corridor planning and the design of stations, bus stops and street improvements. The guide, in tandem with Metro’s First/Last Mile efforts, aims to provide a seamless journey for riders, from door to door – and the connections in between.



Metro Adjacent Development Handbook

Adjacent Development Review Handbook

Published in May 2018, the Adjacent Development Review Handbook provides guidance to municipalities and developers who are undertaking development activity within 100 feet of Metro right-of-way, non-revenue property and transit facilities. The handbook outlines Metro’s review and coordination process and provides user-friendly diagrams to distill and demystify technical design guidance during construction. The handbook and resources are available online at metro.net/devreview.



Eastside Access Improvements

TOC INITIATIVES LESSONS LEARNED

Make staff resources available

One of the consistent tensions in realizing TOCs is balancing Metro’s jurisdictional role, core technical capacity and available funding sources. While Metro defines transportation activities broadly, identifying funding and staffing resources for the array of TOC goals can compete with funding needs for operations, maintenance, services and projects that are core to Metro’s mission. By building staff capacity and expertise in community development and urban design, and by making staff resources available to realize TOC goals, a transit agency creates opportunities to leverage resources in partnership with municipal and community stakeholders. Metro creates a multiplier effect in outcomes and generate far more funding and investments than can be achieved through direct funding of programs and projects alone.

Enable and incentivize partners

Metro’s reach, while extensive throughout LA County, is ultimately limited by its jurisdictional authority. That’s why Metro believes in enabling others to further TOCs in the region. So, Metro is helping municipalities, cities and other partners become empowered to pursue TOC policies and projects in their own communities by providing them with resources, training and technical assistance.

Coordinate with others

Building on the notion of enabling and incentivizing, Metro realizes that achieving TOC goals requires close coordination with municipalities that hold regulatory land use control and ownership of the public right-of-way (for example, streets and sidewalks), as well as community-based organizations, the philanthropic community and other stakeholders. These partnerships require staff resources and sometimes direct funding, but they are critical to realizing TOC goals. The Go Ave 26 project and the WSAB TOD grant are examples of partnerships creating multiplier effects for Metro’s investment of resources.



Wilshire/Western Station

A key lesson learned is that Metro can take a holistic approach and use creativity, innovation and partnerships to realize TOC goals in an expanded radius around our transit stations.

Ask questions and be creative in finding solutions

Sometimes the solution to a challenge is right in front of you if you are willing to ask questions and pursue creative solutions. For example, Metro originally intended to construct a surface park-and-ride lot on land acquired for the Crenshaw/LAX Line to support construction staging activities. However, given the potential for this land to support a transit-oriented development, Metro sought to include the property in a joint development solicitation in conjunction with LA County property across the street. Accommodating the proposed parking in the development would likely have been financially infeasible. However, Metro was able to negotiate additional leased parking in a nearby existing structure to accommodate the committed park-and-ride space at the station, clearing the way for higher-benefit community serving uses adjacent to the station. The selected developer for the site has committed funding to study access improvements around the station, including improving the connection between the station and the parking structure.

Metro's Adjacent Development Handbook is another example of a creative solution as it simplifies and clarifies the often complex relationship that has existed between Metro and its city and developer partners, by providing these stakeholders with an easy-to-use guide on standard procedures and processes. These examples are a reminder that innovation and opportunity can be found by asking questions and applying sound planning principles.

Become a beacon of best practices

Documents such as the Transfers Design Guide, the Transit-Supportive Planning Toolkit and the Blue Line First/Last Mile Plan are becoming the standard of best practices for transit agencies across the nation for the role they can play in incentivizing and realizing TOCs. These documents go beyond transit agencies, offering opportunities for other municipalities to be Metro's partner in realizing holistic communities that meaningfully engage stakeholders and ultimately increase access to transit.

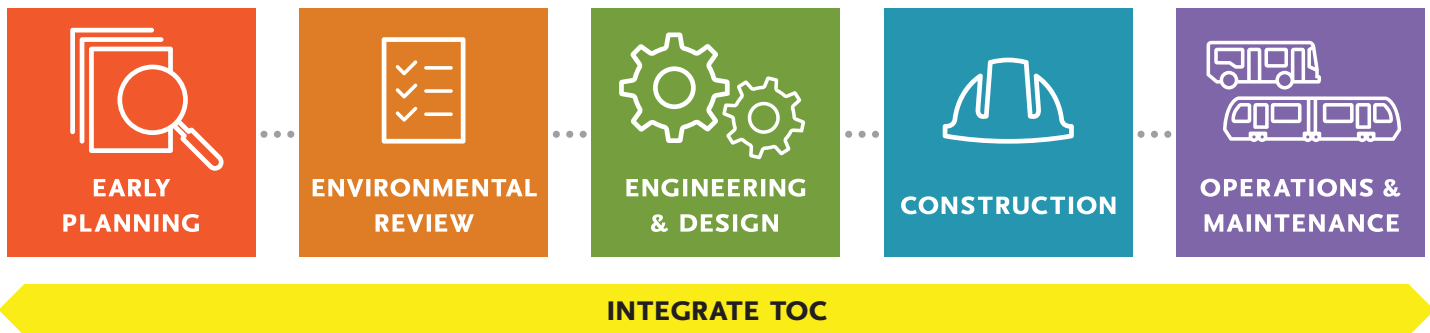
Moving Forward: TOC Version 2.0

When the TOC Demonstration Program launched in October 2015, Metro was in construction for Measure R-funded projects, with plans for more expansion of the system, but with no additional funding in place. At that time, the Demonstration Program was focused on the Joint Development Program, affordable housing policies in development, first/last mile planning, the TOD Planning Grant and other creative ways that Metro could show leadership in support of holistic land use and community development work that strengthens access to transit.

Then Measure M passed in November 2016 and the conversation shifted. A more subtle but important set of discussions began among those working on the TOC vision – the main question being, now that Metro is planning for 17 new transit corridors, how can TOCs be made part of the transit corridor planning process? In essence, how does Metro foster TOCs through transit corridor planning and delivery?

The answer lies in taking a holistic view of the human experience. This requires active coordination and appropriate investment on the part of Metro to design and plan for human-centered transit corridors and TOCs before construction starts – rather than waiting until after a transit corridor is developed. Injecting TOCs into the design at this later stage is a more costly and inefficient use of staff and financial resources.

By integrating TOCs into the transit corridor delivery process, Metro's TOC team, corridor planning team and construction and engineering teams can work together to broaden the set of questions asked when making decisions about new transit lines. This cross-departmental engagement, as well as discussions with impacted jurisdictions and stakeholders, can help develop solutions that maximize positive impacts on the urban environment and encourage equitable transit-oriented growth.



Metro Corridor Delivery Process

Metro's TOC Demonstration Program brought together the growing body of transit work that's underway, made clear Metro's commitment to a more expansive role in community development and land use, and pushed staff to further identify how Metro can expand its impact to create holistic communities centered on access to transit.

In 2018, Metro staff and the Measure M Policy Advisory Council TOC Working Group drafted the TOC Policy, which was adopted by the Metro Board of Directors. This policy was the culmination of lessons learned from the TOC Demonstration Program, as well as a reflection of Metro's newly adopted Equity Platform. True to both of these programs and platforms, the TOC Policy values transparent processes, stakeholder engagement, extensive coordination and informed, holistic decision-making.

Adoption of this policy marked the end of the TOC Demonstration Program, but this is just the beginning. Metro is committed to creating a TOC Implementation Plan and metrics along with an Annual TOC Report, all of which will be completed in early 2020.

With the end of the Demonstration Program, Metro has embarked with full force on TOC version 2.0, with more lessons to be learned – and concrete actions to be taken – in the years to come.

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