





Jobs-Housing Connection Strategy

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BayArea Plan

ASSOCIATION OF BAY AREA GOVERNMENTS

METROPOLITAN TRANSPORTATION COMMISSION

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1. Introduction

The diverse population of the San Francisco Bay Area, home to one of the most impressive and productive estuaries in the world, has access to vibrant cities and towns, spectacular scenic and natural resources and world-class cultural and recreational amenities. The more than seven million of us who call this nine-county region home have a strong interest in retaining and enhancing this great region for our children and grandchildren.

The Bay Area is the global center for high technology and related knowledge-based industries. These industries, combined with our role as a center of trade and investment from across the Pacific Rim, attract an unparalleled level of venture capital and highly skilled workers from around the world. Today however, many Bay Area residents are still experiencing the effects of the recent economic recession.

The most pressing issues currently facing the region include the sluggish national economy, slow job growth in some parts of the Bay Area, increasing income polarization, the needs of a growing senior population, the loss of redevelopment funding, decreased funding for schools and public transit, and the high cost of housing. To overcome these challenges and promote future growth, the region needs an effective strategy based on analysis of both on-going and new challenges facing the Bay Area.

Understanding the Bay Area's development challenges begins with an assessment of how the region's infrastructure systems, related to transportation, water, housing, and neighborhood amenities, will be able to support adequate levels of economic growth. Prior generations in the Bay Area built the necessary infrastructure to accommodate our current economy. Several counties passed General Obligation bonds to raise property taxes and build BART. Bridge tolls were increased to maintain and seismically upgrade our iconic transbay bridges. Major investments have been made to expand regional transit capacity along major employment corridors. Local jurisdictions passed bond and property tax measures to maintain local roads, and special districts raised fees to provide services to new development. These actions were essential for the Bay Area to grow into the global economic center it is today.

In the early 21st century most of the region's existing public resources, however, are needed to operate and maintain existing systems in a state of good repair, particularly the regional transportation network. As a result, preparing the Bay Area for future job growth will require ever greater efficiency and creativity in the allocation of our resources to improve communities and the livelihood of households earning lower incomes. To look forward to 2040 and envision a strong economy, vital communities, environmental resources preserved, and a high quality of life for all, requires that we maximize existing investments and recognize where new investments are needed to make our infrastructure as efficient and equitable as possible. Local, state, and federal policies over this time period will need to secure resources that are strategically utilized to support the economic growth of a region so vital to the national economy.

The challenge ahead for all of us is complex. We cannot assume that our region's economic growth and quality of life will continue for current and future generations without strategic planning and investment. Supporting the Bay Area's economic vitality and its capacity for providing economic opportunity for all of its citizens while preserving open lands and environmental resources, requires focusing growth in a manner that recognizes the unique character of our communities, our spectacular setting and rich natural resources, and the connection between jobs and housing.

Jobs-Housing Connection Approach

To address this complex challenge, regional agencies, local governments, county transportation agencies, transit providers, and community-based organizations, with input from members of the public, partnered to develop the Jobs-Housing Connection Strategy that integrates priorities across housing, economic development, transportation, and land conservation policies. This strategy serves as the land-use element of the Draft Preferred Scenario for the Bay Area's first Sustainable Communities Strategy (SCS) mandated by Senate Bill 375, which requires that California's regions align land use planning and of the transportation investments (SB 375, Steinberg).[1]

[1] Senate Bill 375 (2008) created the five major regional planning and smart growth provisions: (1) Creation of regional targets for greenhouse gas emissions reduction tied to land use. (2) A requirement that regional planning agencies create a plan to meet those targets, even if that plan is in conflict with local plans. (3) A requirement that regional transportation funding decisions be consistent with this new plan. (4) Integration of regional transportation planning and housing efforts for the first time. (5) Additional CEQA exemptions and streamlining for projects that conform to the new regional plans, even if they conflict with local plans.

The Jobs-Housing Connection Strategy proposes a long-term approach to growth focused on locally-designated Priority Development Areas and articulates how the region can capture its economic potential by providing more housing and transportation choices to Bay Area residents and workers. The Strategy seeks to achieve four comprehensive goals: (1) create jobs to maintain and expand a prosperous and equitable regional economy; (2) increase the accessibility, affordability, and diversity of housing; (3) create a network of complete communities; and (4) protect the region's unique natural environment. These four goals combined will leverage existing community infrastructure and transportation investments and preserve farmland and natural resource lands that Bay Area residents have prioritized for long-term protection. At the same time, they will curtail major increases in highway congestion and provide for shorter commutes for the region's workforce. A failure to address these issues has the potential to significantly constrain economic growth and trigger many other negative impacts on our quality of life including increasing commutes and reducing time spent with our families, deteriorating environmental and public health, and threatening the fiscal sustainability of our cities and counties.

The Strategy recognizes the diversity of the Bay Area's communities and emphasizes investing in existing neighborhoods according to the needs and aspirations of each community. The plan seeks to provide an array of housing types and transportation choices and envisions a pattern of growth and investment tailored to each of these communities where transit, jobs, schools, services and recreation are conveniently located near people's homes. It also identifies strategies and policies beyond transportation investments and land use changes that will help foster complete communities—including support for improved public schools, expanded parks and recreation facilities, and efforts to make neighborhoods safer for all.

Transportation investments and policies that support the Jobs-Housing Connection Strategy are identified in the Draft Transportation Investment Strategy that is the transportation element of the Draft Preferred Scenario. These transportation investments and policies will provide for neighborhoods that support less automobile dependency and promote healthier communities through reduced pollution and cleaner air. Improved bicycle circulation and enhanced walking environments will provide expanded sidewalks, improved transit connectivity, and pedestrian-scaled

amenities increasing the opportunity for people to be outdoors and physically active as they go about everyday tasks. In addition to addressing the mobility of people, the Jobs-Housing Connection Strategy and the Draft Transportation Investment Strategy recognize the importance of goods movement corridors and key industrial lands, and identify investments and strategies to ensure that these essential resources continue to support the region's economic diversity and vitality.

Today the region's neighborhoods encompass a wide variety of housing types, but affordability is a significant challenge for low and moderate-income households. In addition, young professionals and young families along with the growing senior population are driving changes in housing preferences and demanding more options closer to services. These trends are addressed in the Jobs-Housing Connection Strategy by focusing on strategic investments for the production of affordable housing and the preservation of homes that are affordable to low- and moderate-income households. In a shift from recent decades, the Strategy encourages housing development—particularly affordable housing—in locations near transit and services to lower the combined housing and transportation costs for households in these neighborhoods. This allows households to spend money on other essential needs such as food, health care, or education.

By concentrating new development in existing neighborhoods, the Strategy helps protect the region's natural resources, water supply, and open space by reducing development pressure on rural areas. This allows the region to consume less energy, reducing household costs and the emission of greenhouse gases. The region's greenbelt of agricultural, natural resource, and open space lands is a treasured asset that both contributes to the region's quality of life and supports regional economic development. In contrast to previous trends that saw these lands consumed for development, the Strategy encourages the retention of them by directing nearly all non-agricultural development within the urban footprint and by supporting the continuation of agricultural activities in rural communities.

Building Upon Local Plans and Strategies

For over a decade, local governments and regional agencies have been working together to encourage the growth of jobs and production of housing in areas supported by amenities and infrastructure. In 2008, the Association of Bay Area Governments (ABAG) and the Metropolitan

Transportation Commission (MTC) created a regional initiative to support these local efforts called FOCUS. In recent years, the FOCUS Initiative has linked local community development aspirations with regional land-use and transportation planning objectives. Through FOCUS, local governments have identified Priority Development Areas (PDAs) and Priority Conservation Areas (PCAs). The Priority Development and Conservation Areas are the implementing framework for the Jobs-Housing Connection Strategy.

PDAs are areas where new development will support the day-to-day needs of residents and workers in a pedestrian-friendly environment served by transit. While PDAs were originally established to address housing needs in infill communities, they have been broadened to advance focused employment growth. Local jurisdictions have defined the character of their PDAs according to existing conditions and future expectations as regional centers, city centers, suburban centers or transit town centers, among other place types. PCAs are regionally significant open spaces for which there exists broad consensus for long-term protection but nearer-term development pressure. PDAs and PCAs complement one another because promoting compact development within PDAs takes development pressure off the region's open space and agricultural lands.

Many Bay Area jurisdictions have worked in partnership with MTC and ABAG to plan and advance the implementation of Priority Development Areas as complete communities in recent years. The Draft Transportation Investment Strategy prioritizes projects in the region's urban footprint that help achieve greenhouse gas reductions while providing social and economic benefits. The majority of the Investment Strategy's funding will be allocated to "fix if first" projects that maintain and enhance existing infrastructure and transit service—much of it in or supporting PDAs.

Building upon the collaborative approach established through FOCUS, local input has driven the set of alternative scenarios that preceded and informed the development of the Jobs-Housing Connection Strategy. Beginning with the Initial Vision Scenario in 2010, feedback from local jurisdictions and stakeholders has shaped the iterations that resulted in this Strategy. Some communities described the level of housing growth depicted in the previous scenarios as too high, while other jurisdictions responded that growth levels would be appropriate if additional funding for public schools, transit, and other community infrastructure were available. The elimination of redevelopment agencies and reductions in transit service were highlighted as major challenges to

growth in some areas. Numerous comments were received on economic challenges and the need to align transportation and other investments to support employment growth and housing production. Addressing regulatory challenges at the regional and state levels was another frequently cited challenge.

The non-profit and business community also played a key role in shaping the Strategy. Business groups highlighted the need for more affordable workforce housing, removing regulatory barriers to infill development, and addressing infrastructure needs at rapidly growing employment centers. Environmental organizations emphasized the need to improve transit access, retain open space, provide an adequate supply of housing to limit the number of people commuting into the region from nearby counties, and direct discretionary transportation funding to communities building housing in PDAs. Equity organizations focused on increasing access to housing and employment for residents of all income categories throughout the region and establishing policies to limit the displacement of existing residents as PDAs grow and evolve.

Plan Bay Area: Understanding the Integrated Approach

Plan Bay Area is the joint effort led by ABAG and MTC in partnership with the Bay Area Air Quality Management District (BAAQMD), and the Bay Conservation and Development Commission (BCDC).



Plan Bay Area includes a core component defined by land use, transportation and housing supported by regional efforts on air quality, resilience to natural disasters and sea level rise (see diagram).

The **land use component** will be defined by the Sustainable Communities Strategy, which is the first SCS for the Bay Area. This is a 30 year strategy that will be revised every four years. The Jobs-Housing Connection Strategy is the land-use element of the Draft Preferred Scenario for the SCS. The Strategy is informed by a series of prior alternative scenarios and related input from communities, citizens and stakeholders. The Draft Preferred Scenario will be further refined for the development of the SCS that will be adopted as part of, and must be internally consistent with, the Regional Transportation Plan.

The **transportation component** is defined by the Draft Transportation Investment Strategy, which is the transportation element of the Draft Preferred Scenario. The majority of the Strategy's funding is committed to "fix if first" projects that maintain and enhance existing infrastructure and transit service. The strategy's discretionary funds prioritize transportation projects that support focused growth. The One Bay Area Grant (OBAG) will distribute $325 million over a four year period among the region's Congestion Management Agencies (CMAs) to fund locally-tailored projects that

support communities accommodating new housing growth in proximity to transit. At least 70% of OBAG funds will support investments in PDAs within the region's largest counties.

The **housing component** is defined by the state mandated Regional Housing Needs Allocation (RHNA) process. Since its inception in 1980, RHNA has been the process by which the California Department of Housing and Community Development (HCD) and regional councils of government such as ABAG work with each town, city, and unincorporated area to plan for its share of the state's housing need for people of all income levels over an 8-year zoning capacity (AB 2853). To encourage greater policy alignment, OBAG funding criteria takes into account past housing production and current RHNA for total jurisdictions for low- and very-low income households.

Ensuring that the Bay Area maintains its strong economy and continues to grow and thrive in the coming decades requires that we also develop strategies for mitigating and adapting to climate change, address air quality issues and plan in a manner that mitigates the impact of, and ensures recovery from, earthquakes in our seismically active region.

2. Past and Projected Regional Trends

Challenges and Opportunities

The San Francisco Bay Area has historically experienced robust economic growth and opportunity linked to its leadership in high technology and innovation, connections to international networks, world-class higher education and research institutions, and a highly skilled labor force. The recession, however, has disrupted livelihoods and communities, altering the landscape of poverty and opportunity in our metropolitan region. While the full scope of this disruption is difficult to measure, employment growth is still projected and demand for new housing production will continue. Trends in employment and housing and their impact on the region are the focus of this section.

The Bay Area experienced rapid employment growth in the 1980's and 1990's. The knowledge and financial sector linkages between Silicon Valley and San Francisco provided the ideal setting for fast, wide-spread economic and employment growth. However, since 2000, the Bay Area has not recovered all of the jobs lost after the dot com crash. While the economy of the Bay Area was hit particularly hard by the dot com crash, the 'jobless growth' of the last decade was a national phenomenon. More recently, with California being one of the epicenters of the housing bubble, the region has been hit hard by the latest economic downturn, with job losses across most sectors.

Employment growth in the region is contingent on a successful future national and global economy. Within that context, the Bay Area can expect healthy but slower employment growth than the past several decades. While the region will continue to be a major knowledge center and continue to produce new, fast-growing companies, more moderate overall employment growth is projected for the next 30 years.

The region's projected rate of growth is still faster than the national growth rate, but only slightly. In recent years, the State of California and the Bay Area have shifted from growth rates that outpace the nation to growth more on par with the rest of the nation. This reflects the maturing of some of the industries and companies that make up the state and regional economies. Geographic constraints and policy protections for resource lands also limit future greenfield development and spatial

expansion in the region, which has fueled part of the economic growth in California in the last century. And finally, demographic changes in the region's workforce, in particular the aging and looming retirement of the baby boom generation, will place a drag on labor force growth. This means that a growing number of job opportunities in the region will be through turnover and replacing retiring workers, and not increasing the overall number of jobs in the region.

The Bay Area in previous decades experienced a pattern of major suburban housing production and employment growth. For example, cities like Oakley, San Ramon, Brentwood, Windsor, Clayton, and Rohnert Park had grown 8 to 26 times their sizes since 1970 by 2010. At that time the development of subdivisions was supported by the expansion of the highway transportation network. This population provided a labor force for employment growth at suburban locations. Starting in the 1980s, office jobs moved from the San Francisco Financial District to new office parks in the East Bay or South Bay. At the same time, the growth of Silicon Valley perfected the office park model that was pursued in many other parts of the world. The extension of the transportation system into the Tri-Valley and its proximity to low cost housing areas in the Central Valley further supported this model and fueled job growth eastward in the region and higher demand for suburban housing. By 2010 only 16% of total regional employment was in San Francisco, a decline from 33% in 1975. While this decentralization of jobs combined with the growth of affordable housing options in suburban communities created new opportunities for many areas in the region, it also led to high levels of traffic congestion, increases in the cost of and time spent commuting, higher percentages of low-income families living in the outer suburbs, and the loss of agricultural lands and natural resources.

The housing boom of the mid-2000s expanded the supply of affordable suburban housing significantly. With rising rents and home prices in communities close to the Bay, many renters and homeowners were encouraged to either seek environments with greater opportunity or sell their houses for larger properties farther from the central city and away from viable public transit. This outward spread of growth has been addressed in part through the development of policies and regulations to protect open space, including the creation of urban growth boundaries and other land policy protection measures by local jurisdictions, and through investments in existing communities with transit access and proximity to a wide range of services, amenities, and employment opportunities.

The boom years that defined and allowed for the past 40 years of housing development have passed. Today, recovering from the recession, improving housing affordability in suburban areas and providing housing for low and moderate income households in high-demand, job-rich areas are among our greatest challenges. When the housing market crashed, home values in suburban areas, particularly in Eastern Contra Costa and Solano County decreased the most in the region. Many of these areas are feeling the brunt of the economic downturn, with high rates of foreclosures and vacancies. In 2008, roughly 37,000 homes had been foreclosed upon and an additional 154,000 more foreclosures are expected to occur by the end of the decade (Chapple 2012). Historically, annual average housing production in the Bay Area has resulted in shortfalls of about 30%, according to the California Department of Housing and Community Development (State of California 2000). This trend was temporarily reversed during the decade of the 2000s, when the market overpriced housing, spurring more affordable construction in areas of the region distant from job centers.

As a result of this disconnection from jobs, Bay Area households living in poverty increased 16% in the suburbs compared to only 7% in urban areas.[2] African-Americans and Latinos saw the greatest increase in suburban poverty (Soursourian 2012). Affected communities continue to try to find ways to fill vacant foreclosed properties and to reduce the number of foreclosed properties in the future.

Despite the obstacles inherent to the trends illustrated above, economists assert that the region is well positioned to regain its economic strength, some of which is already underway (Levy 2012; Bay Area Council Economic Institute 2011). By the end of 2011, the San Jose Metropolitan Statistical Area (MSA) and Silicon Valley were experiencing job growth that, while modest relative to recovery periods historically (3%), was much higher than the national average (Levy 2012). Most of this job growth is driven by high technology companies such as Google, Apple, Facebook, and Zynga among others. The knowledge economy today is increasingly linked between multiple industry sectors that support a wide variety of occupations and skill-sets. During 2011, unemployment in the San Jose Metropolitan Area (MSA) had already declined from 10.5% to 8.6%. Many other parts of the Bay Area, particularly inland communities furthest from Silicon Valley, have not yet displayed

[2] Nationally, households in extreme-poverty increased by 41% in suburbs compared to 17% in cities, and nearly all large metro areas ended the decade with lower median incomes than in 2000.

signs of economic recovery, but are expected to experience some growth in 2012 and 2013 (Bay Area Council Economic Institute 2011).

Table 2.1. Regional Trends - Challenges and Opportunities

	Challenges	Opportunities
Employment	• Decentralization of jobs • Declines in manufacturing employment • Lag between GDP and employment growth • Average K-12 educational levels • Funding cuts in higher education • Loss of 200,000 acres of agricultural land	• Global innovation hub • Concentration of venture capital • Research institutions • High growth knowledge-sector industries and companies • $1.8 billion in agricultural products produced each year by Bay Area farmers
Housing	• Loss of Redevelopment Agencies • High cost of living • Foreclosure and delinquency rates • Obstacles to Infill development	• Aging population and expected changes in housing type demand • Changing preferences of younger workers • Infill development

Bay Area Growth: 1900-2010

Bay Area Population

1900	660,000
1940	1.7 Million
2010	7.1 Million
2040	*9.3 Million* (projected)

Population data from US Census

Maps courtesy of Global Metropolitan Observatory, Bosselmann, Moos, Doyle,
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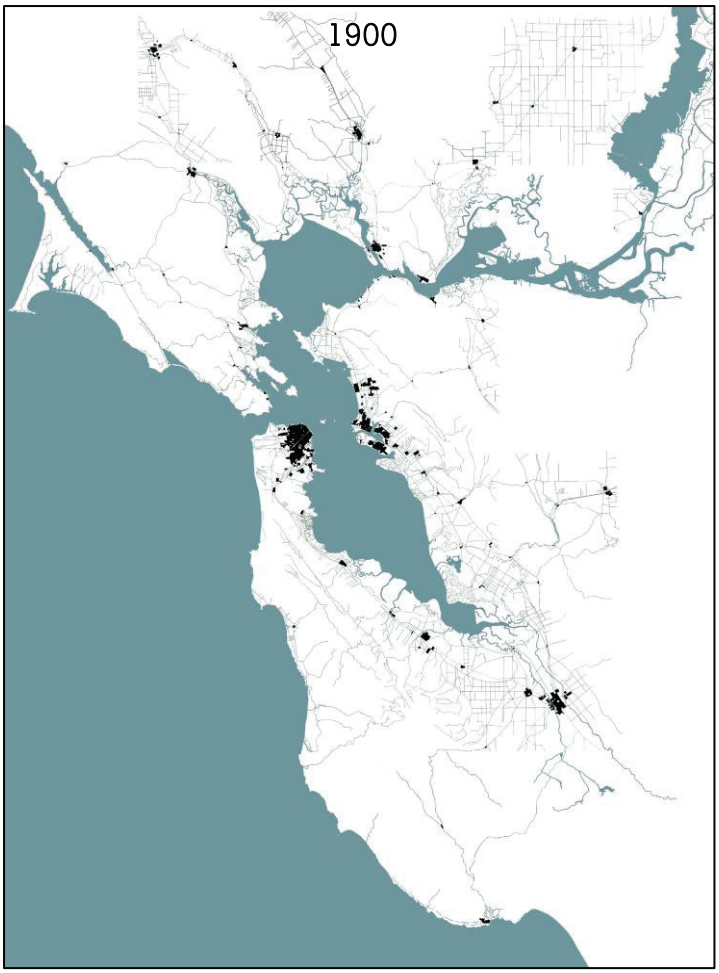
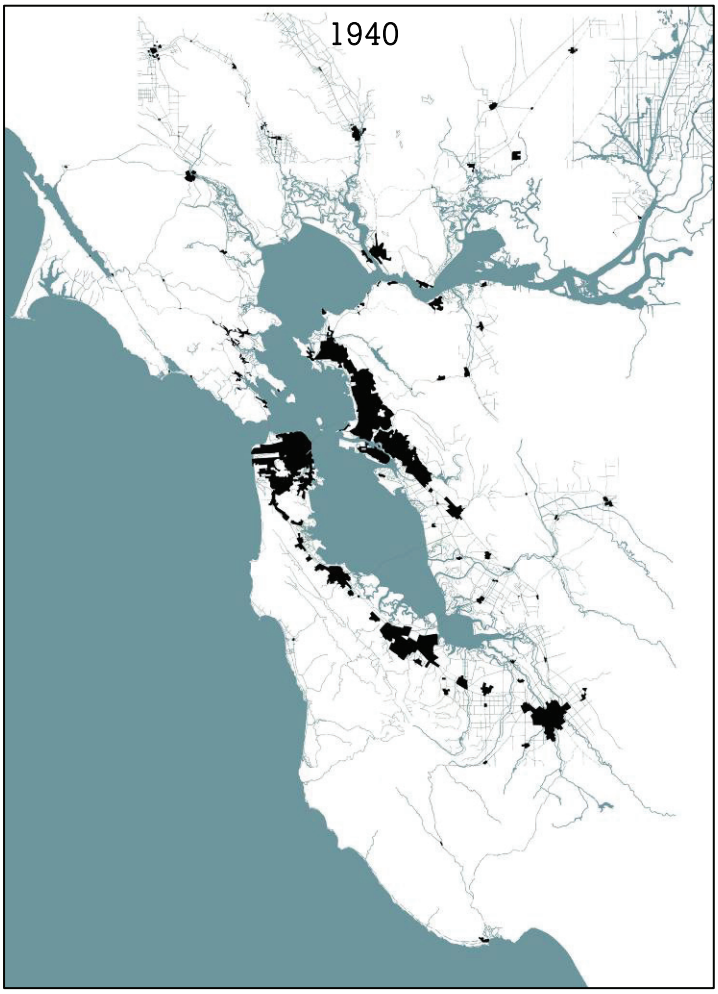
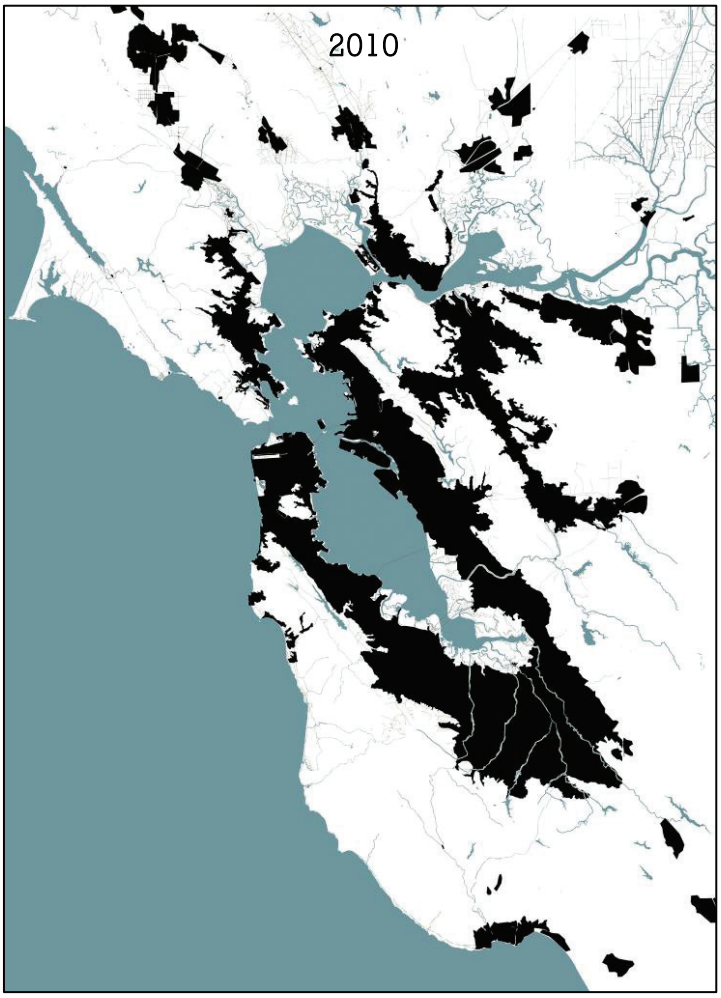






Regional Growth by 2040

By 2040, the region is projected to have approximately 4.5 million jobs and 3.4 million housing units, or an additional 1.1 million jobs and 660,000 housing units from 2010.[3] This projected level of housing production is ambitious, yet provides a level of housing that supports a lightly lower employment growth than the region could potentially capture based upon its competitive advantage in high growth industries.[4]

With the re-absorption of some 40,000 vacant, foreclosed units, this level of housing production of 660,000 will allow the region to accommodate the 700,000 new households and 2.1 million people forecasted in the SCS through 2040. Because of the high unemployment levels in the 2010 base year, a significant number of new jobs will also go towards employing existing residents over this period. This also assumes that the rate of net in-commuting will remain at 2010 levels, greatly reducing the region's reliance on surrounding areas to house our workforce.

Table 2.2. Regional Totals, 2010 and 2040

	2010	2040	Growth 2010 - 2040
Population	7,151,000	9,299, 000	2,148,000
Households	2,608,000	3,308,000	700,000
Housing Units	2,786,000	3,446,000	660,000
Jobs	3,385,000	4,505,000	1,120,000

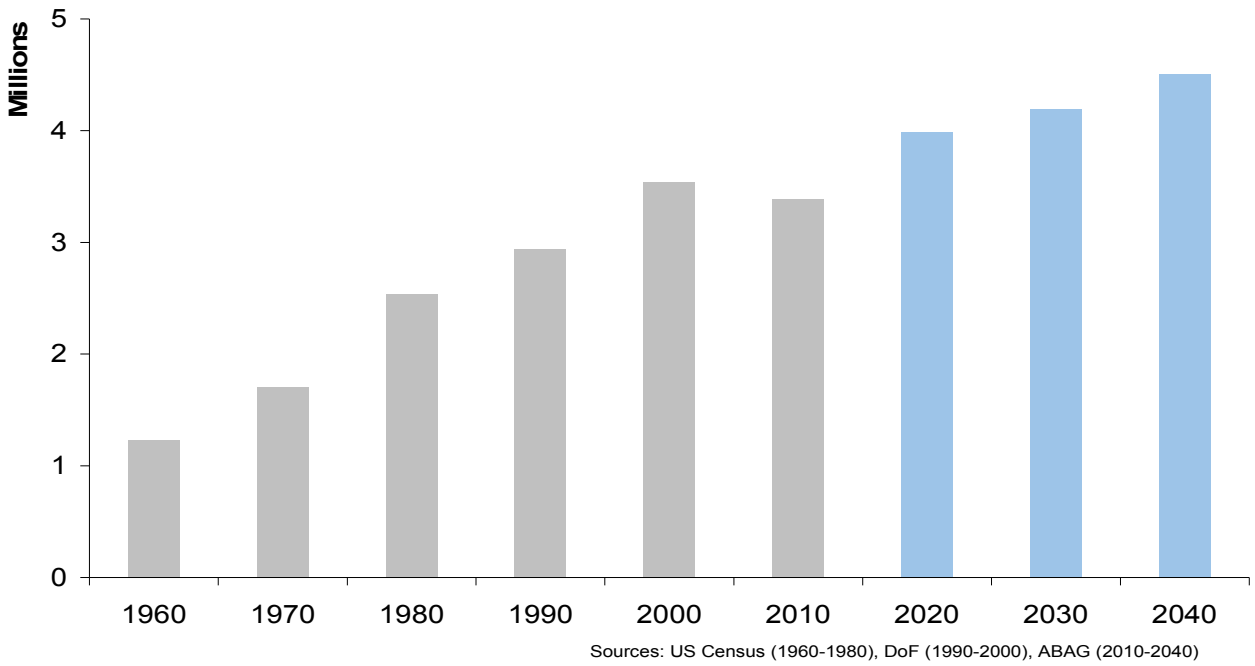
[3] Compared to 2007 pre-recession employment, the 2040 employment forecast reflects an increase of 850,000 jobs.
[4] An economic analysis conducted by the Center for Continuing Study of the California Economy projected potential Bay Area employment of 4.6 million by 2040. (Levy 2012) However, the total job growth is constrained by our ability to produce housing, which is ambitiously estimated at 660,000 new units by 2040. This is a higher level of housing production than that estimated by Karen Chapple, UC Berkeley, based on an assessment of previous housing production in the region, which estimates future housing production as low as 80% of existing levels, or less than 600,000. (Chapple 2012)

2.1 Employment Trends by 2040

The region is forecast to grow slightly faster than the nation. Over half of the 1.1 million job growth is expected to occur between 2010 and 2020, which includes the recovery of close to 300,000 jobs lost since 2007. Many of these jobs will be filled by currently unemployed or underemployed individuals. From 2020 to 2040, the rate of job growth is forecast to slow down as retiring Baby Boomers exit the labor force (Levy 2012).

The growth of 1.1 million jobs does not translate directly into new office, commercial or industrial space. About one third of these jobs could potentially be accommodated within existing offices and facilities given current vacancy rates and the higher regional employment levels experienced in 2000.

Figure 2.1. Regional Total Employment by Decade, Past and Future



Growth by Economic Sectors

The leading sectors of the regional economy are defined by those directly involved in knowledge production. This includes Professional Services, Information, Finance, and portions of the Health and Education sectors. They all show high growth rates (see Table 2.3). Many companies in these sectors have become more specialized on the design and development of new products and information, outsourcing the manufacturing and general professional services components. These knowledge-based sectors are supported by a highly educated labor pool and provide many high wage jobs. The Bay Area's labor force has the highest share of college graduates (44%) when compared to any other region in the country (Levy 2012). These leading sectors have represented and will continue to represent a high share of the total regional growth, accounting for over one third of total jobs. Although the knowledge-based sectors define the overall pace of growth for the region, their success is supported by and advanced by a very diverse regional economy.

The Health and Education and Leisure and Hospitality sectors have not experienced the very high job growth of Professional and Business Services, but have displayed steady growth even through periods of overall economic decline. Construction is expected to experience significant employment gains, particularly through the recovery period.

Manufacturing and finance jobs have contracted over the last 30 years. Much of the region's traditional manufacturing employment has relocated to low cost labor regions in Asia and Latin America. More recently, high tech manufacturing has also relocated out of Silicon Valley to lower cost locations. Increases in productivity through information technology and automation have impacted all sectors, but manufacturing and finance in particular. While the region continues to be an important financial center, finance-related jobs have been eliminated or relocated out of the Bay Area. Manufacturing and Finance are not expected to contribute much to job growth but will remain stable sectors in the regional economy. The decline of manufacturing and finance employment has resulted in a loss of some middle-income jobs for the region. This is compounded by the polarized incomes between the highly specialized knowledge-based jobs and service jobs. Similarly, the agricultural sector—where food production is combined with high value tourism, organic markets, and farmers markets—has incorporated a wide range of services and exchange

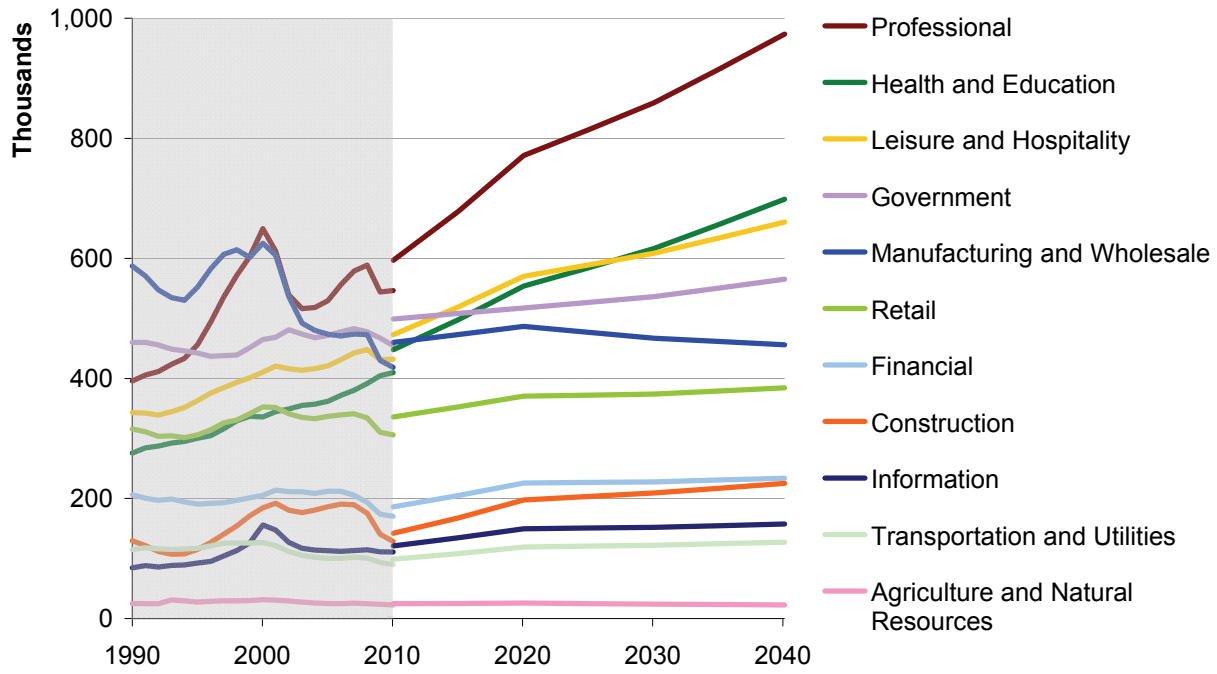
networks with a resulting higher productivity for many businesses. However, the number of jobs in this sector is expected to remain the same or decline.

Table 2.3. Total Employment and Growth by Sector, 2007, 2010 and 2040

	Total			Growth	
	2007	2010	2040	2010-2040	2007-2040
Professional	633,000	596,700	973,600	376,900	340,600
Health and Education	420,100	447,700	698,600	250,900	278,600
Leisure and Hospitality	484,300	472,900	660,600	187,600	176,200
Government	529,400	499,000	565,400	66,400	36,000
Information	123,500	121,100	157,300	36,300	33,800
Transportation and Utilities	111,300	98,700	127,400	28,600	16,000
Financial	219,400	186,100	233,800	47,700	14,400
Construction	211,200	142,300	225,300	82,900	14,000
Retail	373,800	335,900	384,400	48,500	10,700
Agriculture and Natural Resources	27,900	24,600	22,700	-1,900	-5,200
Manufacturing and Wholesale	519,800	460,200	456,100	-4,100	-63,700
All Jobs	**3,653,800**	**3,385,300**	**4,505,200**	**1,119,900**	**851,400**

Sources: Stephen Levy, ABAG

Figure 2.2. Employment by Sector, Past and Future

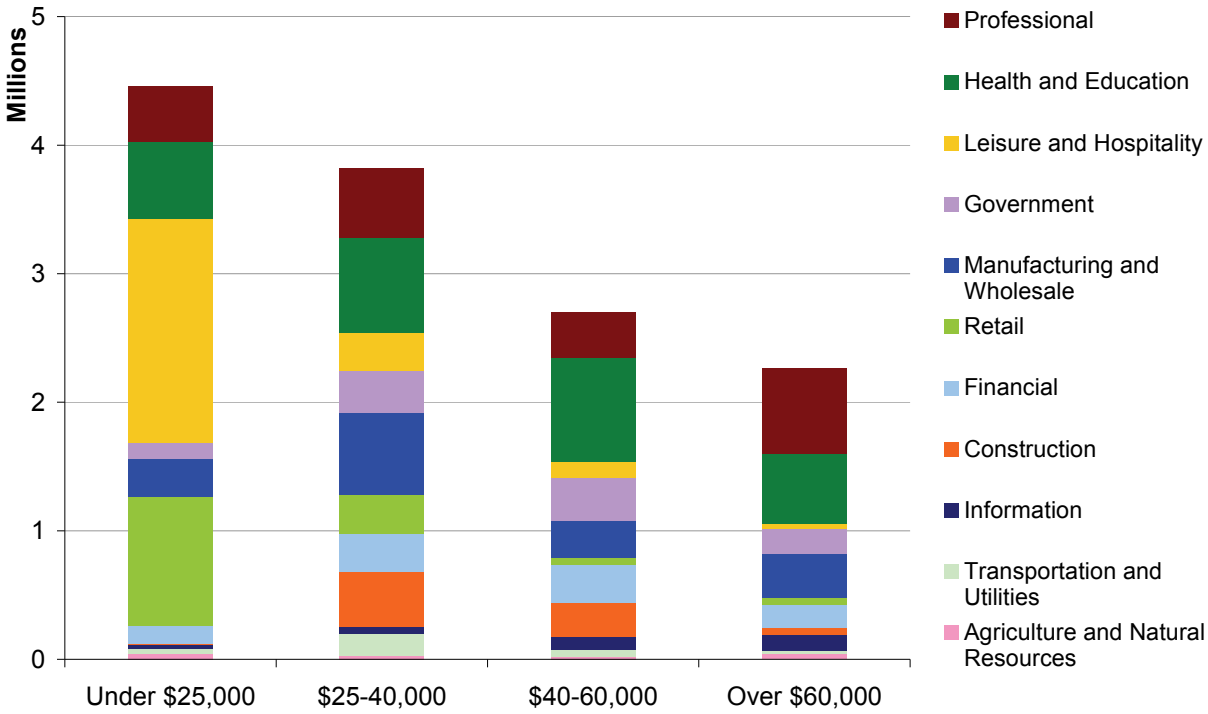


Sources: EDD (1990-2010), ABAG (2010-2040)
Note: Higher ABAG numbers from 2010 onward reflect inclusion of self-employed and domestic workers.

Sectors, Occupations, and Incomes

Within each industry sector classification is a wide spectrum of occupations and wages. As Figure 2.3 illustrates from statewide data, most industries provide jobs at a wide range of wage-levels, particularly the two sectors with the highest projected growth, Professional Services, and Health and Education. Professional Services has the highest share of occupations that earn over $60,000 annually, while Health and Education has the highest share of occupations that earn between $40,000 - 60,000: both show substantial numbers of jobs at all wage levels. Both Construction and Manufacturing and Wholesale have significant numbers of jobs in middle income occupations. Leisure and Hospitality (which includes hotels) and Retail both have a high share of low-income jobs with limited opportunities for promotion and higher wages.

Figure 2.3. 2010 California Employment Distribution by Sector by Income



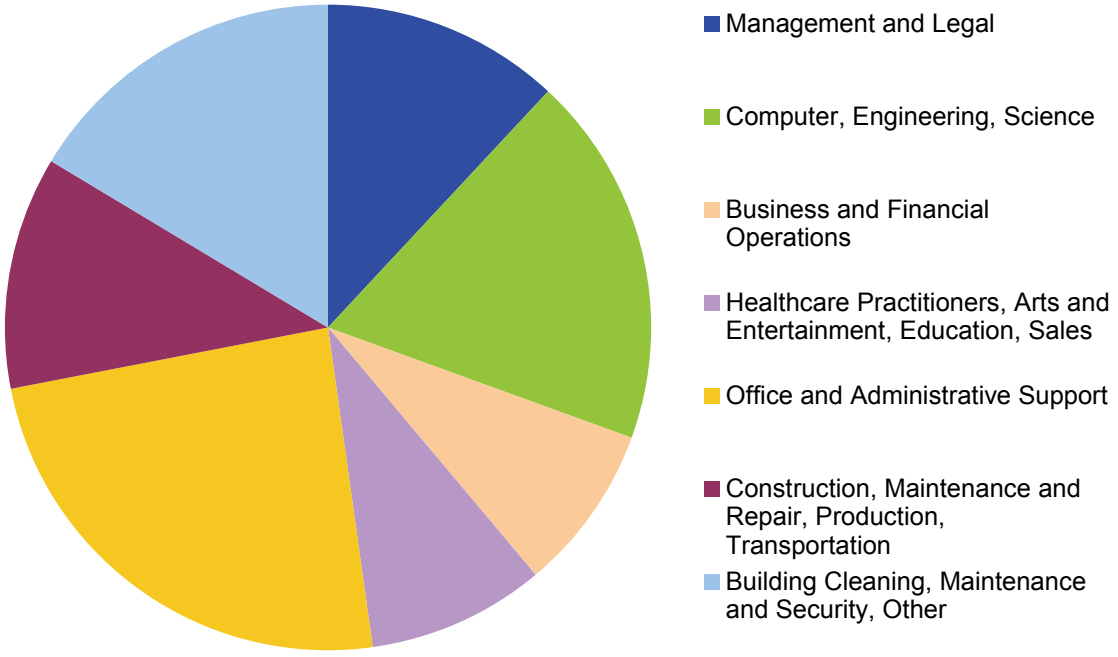
Source: EDD and BLS, analysis by Karen Chapple, UC Berkeley, and ABAG.

The industry sectors also represent a wide range of occupations, which correspond to the different skill levels and types of training needed to fill these jobs. Figure 2.3 and Table 2.4 illustrate this by detailing the occupational breakdown and income levels within the Professional Services sector, which is projected to show the highest job gains in the coming decades.

As Figure 2.4 demonstrates, less than half of the jobs within Professional Services are what one might first associate with that sector, with higher degrees of education, specialization, and wages (Management and Legal; Computer, Engineering, and Science; Business and Financial Operations; Healthcare Practitioners, Arts and Entertainment, Education, Sales). Close to a quarter of the jobs in this sector are Office and Administrative Support occupations, with an average estimated income of $33,000. Another quarter of the Professional Services jobs are filled by construction, maintenance, transportation, cleaning, and security occupations.

This is not to say that the continued national and regional shift towards knowledge and service industries does not have an effect on income levels and opportunities for career advancement for workers of different skill levels. Job declines in Manufacturing, Construction, and even Government have hit middle-income earners the hardest. As outlined later in this section, the share of households in the low and very-low income categories are projected to increase. Economic development and workforce policies in the region will need to work towards creating a higher share of middle-income jobs and improving opportunities for advancement among Bay Area workers.

Figure 2.4. 2010 California Professional Service Jobs by Occupation



Source: EDD and BLS, analysis by Karen Chapple, UC Berkeley, and ABAG

Table 2.4. Average Income by Occupation, 2010 California Professional Service Jobs

Occupation	Average Income
Management and Legal	$100,400
Computer, Engineering, Science	73,100
Business and Financial Operations	62,900
Healthcare Practitioners, Arts and Entertainment, Education, Sales	47,700
Office and Administrative Support	33,000
Construction, Maintenance and Repair, Production, Transportation	30,300
Building Cleaning, Maintenance and Security, Other	23,800
All Professional Service Jobs	**$50,500**

Note: Average income for the broad occupation categories above are approximations based on median income and number of employees for the 800+ detailed occupations under the BLS 2000 Standard Occupational Classification.
Source: EDD and BLS, analysis by Karen Chapple, UC Berkeley, and ABAG.

Growth Trends by Places

Economic sectors organize jobs by activities and products such as sales, computer services, food preparation, or health care, among many others. Each of these sectors includes many different subsectors and each subsector can occupy a wide range of buildings and places. For example, the professional and business services sector include accounting, graphic design, testing laboratories, telephone services, janitorial services, waste collection. These businesses can occupy an office, an industrial laboratory, or a treatment facility, among several other types of buildings. Even within a particular type of business we can find many building types. A graphic designer's office can be a home office in Orinda or a floor of a high rise building in San Francisco's South of Market District. In addition, economic activities are constantly changing their space requirements. A printing company that retains the design component and outsources the actual production would only require a small office. Thus, in order to forecast the regional employment distribution, the sections below summarize key land use trends that capture the ongoing spatial changes as well as changes in the labor force composition and workers' preferences. Overall trends suggest a transition toward a more focused employment growth pattern for the region. This focused growth takes a variety of forms across the various employment centers throughout the region.

Knowledge-based, culture, and entertainment at regional centers

Contrary to previous trends of job decline in major regional centers,[5] the recent growth of professional services in close proximity to urban amenities is expected to lead to an increase of job growth in Downtown San Francisco, Downtown Oakland, and Downtown San Jose—assuming an appropriate provision of infrastructure, transit, and access to affordable housing. At these regional centers, leisure and cultural activities have also been fueled by the Bay Area's confluence of international business and leisure travelers as well as artists and entertainers. Similar to the growth of San Francisco's financial district in the 1970s, the Bay Area is attracting new businesses and workers seeking to locate in close proximity to related firms, services and amenities. The new wave of businesses and professionals' demand for building space prioritizes flexibility to adjust spaces to multiple functions and requires less office space per worker relative to the early growth of traditional downtown office space.

Multiple activities and transit at office parks

Office parks have and are expected to continue to accommodate a growing number of employees. However, given the limited land available for new office parks, existing vacant office space, and the preference for walkable, transit-served neighborhoods by a growing number of employers, office parks are expected to grow at a slower pace than in recent decades. Existing office parks are also using less space per worker, providing transit access, and in a few cases adding housing, services and amenities. The emerging private shuttle services run by businesses, particularly in San Mateo and Santa Clara Counties, are expected to grow and improve transit access while lessening, but not fully mitigating, increased freeway traffic congestion related to employment growth.

[5] Regional centers have reduced their office jobs as a share of the region from 49% in 1990 to 41% in 2010. Downtown San Francisco and Downtown Oakland also reduced their absolute employment levels. Downtown San Jose had a small increase.

Downtown areas and transit corridors serving residents

Over the last decade, downtown areas in medium and small cities throughout the region have been expanding their services and jobs. The number of shops and festivals around the historic train station has expanded in Downtown Santa Rosa. Downtown Mountain View has a very active main street with an increasing number of restaurants and bars. New entertainment venues and amenities have located in the core of downtown Livermore. The increase in the senior population, combined with the region's changing ethnic demographic profile, is expected to increase the need and demand for local services in downtown areas in close proximity to residential locations with greater transportation choices. In the last decade, Priority Development Areas have shown an increased concentration of knowledge-based, arts, recreation, health, and education jobs.

New vitality of industrial and agricultural land

Manufacturing and wholesale distribution have experienced declining employment in many of the region's key industrial areas. However, in recent years a different and very diverse mix of businesses has relocated to these areas. In addition to basic services such as shuttle services, refuse collection or concrete plants, industrial lands are now occupied by a wide range of businesses from food processing to high tech product development, car repair, graphic design, and recycling among others. Because of their building and space needs, these economic sectors are coalescing in traditional industrial lands. They provide essential support to the leading knowledge-based sectors of the economy as well as to residents.

The trends in agricultural land have paralleled those of industrial land in its increasing diversity of activities. But, in the case of agricultural land, growth is related to the addition of services and tourism. The Bay Area's wealth of agricultural land is unparalleled among our nation's largest metropolitan regions and provides high quality products including a world-renowned wine industry. Beyond tourism, agricultural land and activity in the region is also a strong quality of life attractor for residents of the Bay Area.

2.2 Population Trends by 2040

The forecasted population growth of 9.3 million people by 2040 is based on projected regional employment growth shaped by national economic and demographic forecasts (Levy 2012). The relationship of jobs to population was calculated by Steve Levy of the Center for the Continuing Study of California's Economy (CCSCE) based upon population characteristics.[6] The population characteristics used in the scenario incorporate information from the 2010 Census and a statewide forecast produced by the California Department of Finance.[7] Two major demographic changes shape the forecast of household and job growth: the increase in the senior population and the increase in the Latino and Asian populations.[8]

These demographic changes lead to three major trends in the regional growth by 2040:

1. Increase in group housing: The increase in the senior population results in an increase in the amount of residential care facilities, which is a major component of group housing. More than 66,000 additional group housing residents are forecasted by 2040. This is a conservative estimate based on current conditions.
2. Decline in labor force participation: The overall labor force participation rate declines given the increase in the senior population, even taking into account increases in the percentage of people working beyond the age of 65. This means that, by 2040, 49.8 people out of 100 will be employed or looking for work, compared to 51.6 in 2010.
3. Increase in household size: The number of people per household is expected to increase from 2.69 in 2010 to 2.75 in 2040 as a result of the increase in the Latino and Asian population as well as the number and percentage of multigenerational households.

A summary of demographic assumptions is included in the Appendix.

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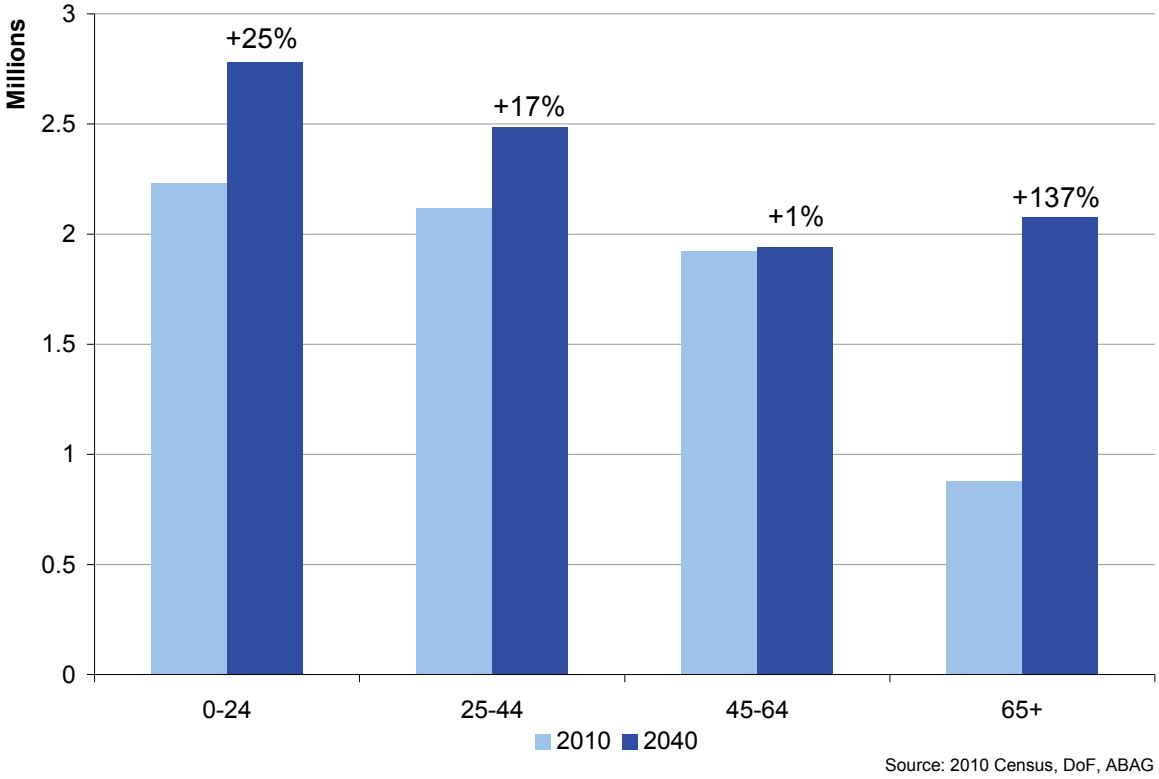
[6] The Jobs-Housing Connection Scenario includes an adjustment of 0.7% higher employed residents than the numbers forecast by Levy. This adjustment is the result of retaining the 2010 in-commute ratio out to 2040.

[7] The California Department of Finance assumes a statewide net migration averaging 177,000 per year, which represents 35% of the statewide total population growth. (State of California, Department of Finance, *Population Projections for California and Its Counties 2000-2050, by Age, Gender and Race/Ethnicity*, Sacramento, California, July 2007).

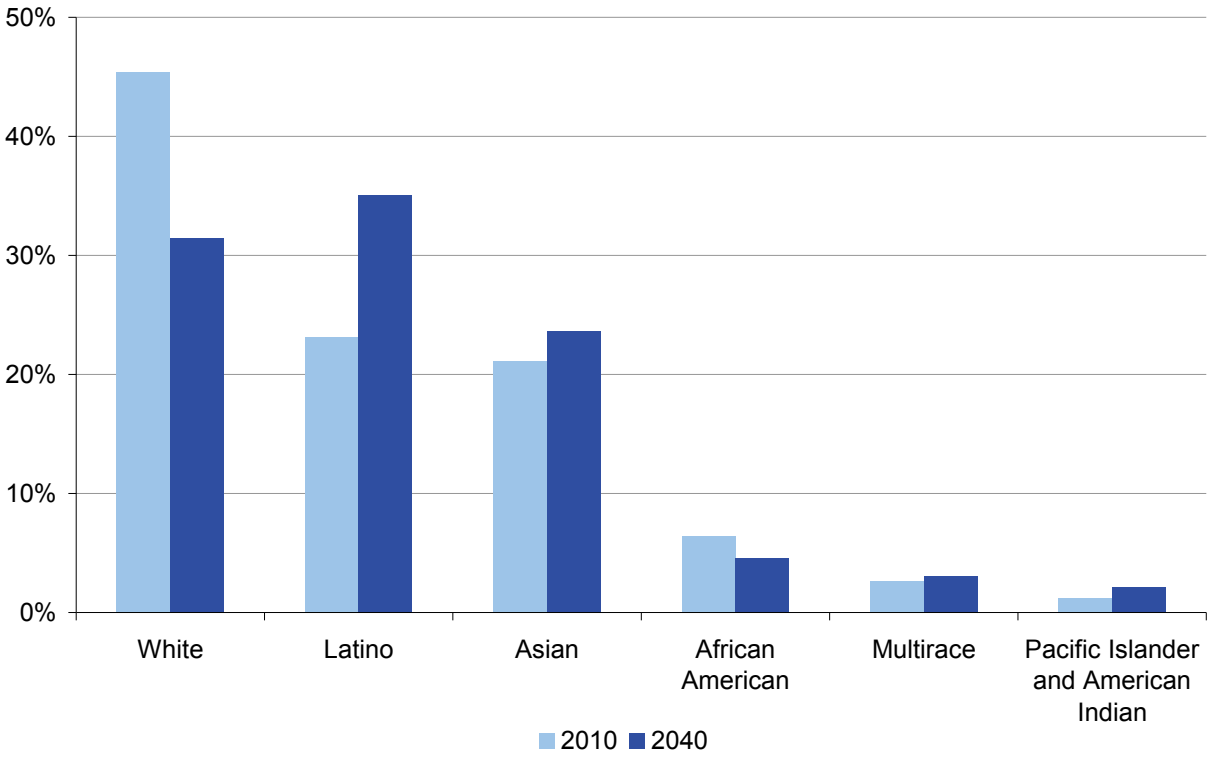
[8] Latino and Asian populations projected to increase 11.9% and 2.4% respectively. This change is already reflected in the existing population, where the non-Hispanic white population makes up 56% of 55-64 year-olds, while only making up 33% of 15-24 year-olds.

Figure 2.5. Population by Age, 2010 and 2040



Source: 2010 Census, DoF, ABAG

Figure 2.6. Share of Population by Race and Ethnicity, 2010 and 2040



Source: 2010 Census, DoF, ABAG

2.3 Housing Trends by 2040

Based on the employment forecast and the assessment of previous housing production, the Jobs Housing Connection Scenario assumes the production of 660,000 housing units. This level of production will allow the region to house all its population by 2040. This production of housing will be supported by current and new strategies in order to secure housing for residents at all income levels. A regional concerted effort to support housing affordability will ensure that the Bay Area is able to retain the vitality and competitiveness of its economy and a high quality of life for all residents.

Housing and jobs

The forecasted employment growth by industry is translated into occupation and wages to assess the income levels by 2040. All income groups show an increase by 2040 with small changes in the distribution: higher shares for the very low and low income households and lower shares for the moderate and above moderate income households.[9]

Table 2.5. Number of Households by Income Group, 2010 and 2040

	Very Low	Low	Moderate	Above Moderate	Total
2010	25%	15%	18%	42%	100%
2040	26%	17%	17%	39%	100%

Source: EDD and BLS, analysis by Karen Chapple, UC Berkeley, and ABAG.

As is the case today, high-income households are likely to have a wide range of housing options. However, in order to ensure a healthy economy the region will need to focus on strategies and investment that provide housing for much of the region's workforce—sales clerks and secretaries, firefighters and police, teachers and health service workers—whose incomes would severely limit their housing choices. This has been an increasing challenge in the region, particularly in employment-rich locations given that market-rate housing development has been increasingly unable to deliver housing for the middle class. Even more challenging is the housing situation encountered by low and very low income households wage workers who struggle to find housing that costs less than 60% of their income.

Housing choices – growing demand for new multifamily housing

The demographic changes described above are changing the housing choices among Bay Area residents. The growth of the senior, the Latino and Asian, and "echo boom" populations presents a different set of housing needs and choices. People aged 55 and over are more likely to prioritize public transportation, walking, and access to amenities, and are more receptive to townhouses and condos with smaller yards and smaller units than other types of households (Myers and Gearin 2001;

[9] The analysis translated industry sector-level employment forecasts by county into estimated growth in households in four income groups: very low (less than 50% of median county household incomes), low income (50-80%), moderate income (80% to 120%), and above moderate income (greater than 120%).

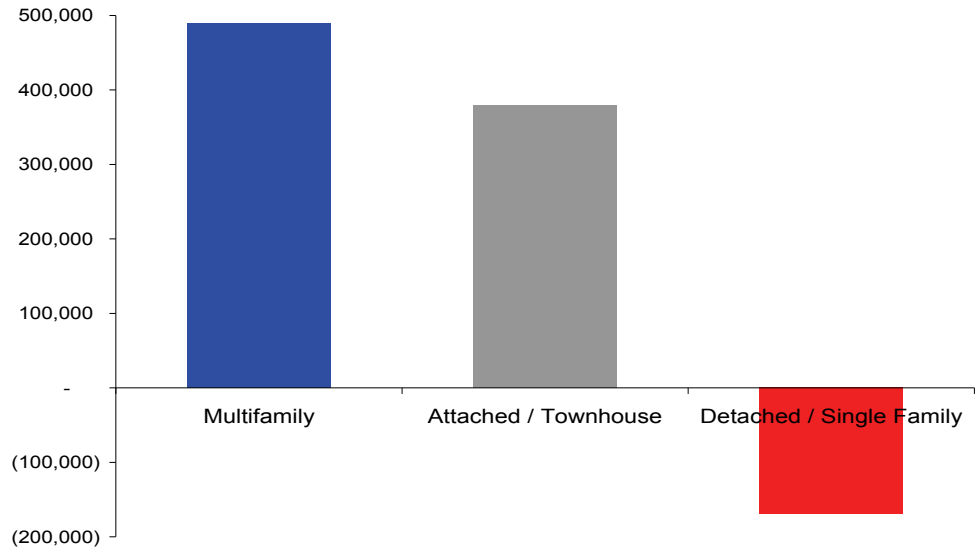
Belden Russonello & Steward 2011). Similarly, young singles are particularly attracted to places that offer walking access to shops, restaurants, cultural events, and clubs and prioritize short commutes (Belden Russonello & Steward 2011).[10] This so- called "Echo Boom" generation has a particular affinity for neighborhoods where they can walk and bike as an option.[11] Analysis indicates that Latino and Asian households have also shown a preference for more housing choices that provide access to services and amenities and that accommodate multigenerational families. Cultural preferences of new immigrants also suggest they may be more willing to utilize public transportation and live in multifamily housing than native-born residents (Mendez 2005). The large number of relatively affluent aging baby boomers, the minimal projected growth of the 35-54 age cohort, and the preference for urban living among echo boomers, suggests future growth in the market for multi-family housing in infill locations (Nelson 2011).

While single family neighborhoods will remain desirable for a significant segment of our population, the current stock in relation to projected demographic change provides a large supply relative to demand in the coming decades. This is in part because single family homes have been the predominant form of housing produced in the region for decades. In contrast, townhouses, apartment buildings, condos, and other multifamily housing options are currently comparatively limited.[12]

These changing preferences and demographics will impact the type and location of housing demanded in the future. An analysis by Professor Arthur Nelson suggests that demand for multifamily homes in the Bay Area will increase as demand for single family homes decrease (Nelson 2011). Single family homes will still be the most sought after housing type, but as they currently represent over half (56%) of all homes, an oversupply is projected by 2040 when only 39% of households may be seeking single family homes.[13] By contrast, the demand for multifamily homes may increase to 35% while demand for attached town homes may increase to 26% (Table 2.6).

[10] "Generation Y" is the largest demographic cohort nationally. (Harvard 2011)
[11] Department of Transportation statistics show that average daily vehicle miles travel (VMT) for people under 35 has declined steadily since 1995. "Table 33. Vehicle Miles of Travel (VMT) per day for Younger Population Groups by Urban and Rural Household Location 2009 NHTS," (U.S. Department of Transportation 2011).
[12] The Center for Transit Oriented Development's analysis finds that 23% of Bay Area households (about 600,000) live near transit today, while there is a market demand for up to 38% of all Bay Area households to live in transit-accessible areas in future decades. (Metropolitan Transportation Commission 2005).
[13] ABAG estimate based on Arthur Nelson's work using projected totals from the *Jobs Housing Connection Report*.

Figure2.7. Housing Unit Demand by Building Type, 2010-2040



Source: ABAG, adapted from Arthur C. Nelson

Table 2.6. Net Housing Supply and Demand by Building Type, 2010-2040

Building Type	Supply 2010		Demand 2040		Housing Demand 2010-2040	Net Housing Demand 2010-2040
Multifamily	717,000	26%	1,206,100	35%	489,100	393,900
Attached / Townhouse	508,000	18%	888,000	26%	380,000	306,100
Detached / Single Family	1,535,000	56%	1,365,900	39%	-169,100	0
Total	*2,760,000*		*3,460,000*		*700,000*	*700,000*

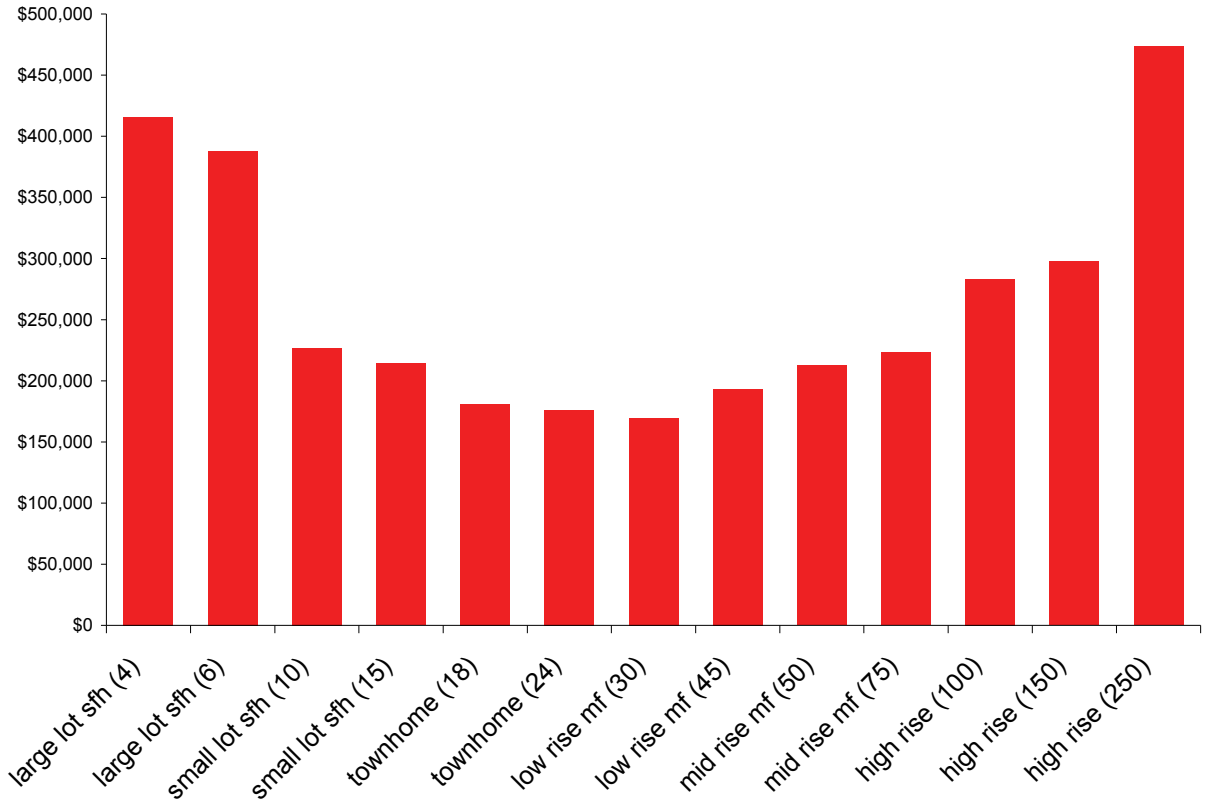
Source: ABAG, adapted from Arthur C. Nelson

This projected oversupply of single family homes, however, is expected to dampen demand for other housing types by almost 170,000 units as some households that would otherwise choose multifamily units instead opt for single family homes made more affordable due to excess supply. As a result, new multifamily housing demand is estimated at 394,000 units, and 306,000 new units for attached town homes (Table 2.6). Although this suggests no demand for newly constructed single family homes, some production will occur as the Bay Area housing market adjusts to these

trends.[14] See Appendix D for a list of other conditions that could impact the housing market in the future.

In terms of cost, multifamily units constructed in suburban areas are less expensive than single-family homes. Although this is due in part to lower land costs, building construction cost data suggest that low to mid-rise buildings can be cheaper on a unit per acre basis as more units can be produced within the same land area.[15] Because of this space efficiency, multifamily units also consume less energy and require less maintenance further reducing housing cost. This holds true for larger family-sized units with several bedrooms that are, on average, smaller than their single-family equivalents (Figure 2.8).

Figure 2.8. Construction Costs by Building Type (and units/acre)



Source: R.S. Means Cost Manual, Bay Area

[14] Unlike a perfectly competitive market where supply and demand react immediately to changes in market conditions, real estate supply is fixed in the short run and cannot respond quickly to a changing market. As a result it takes a minimum of several years to develop new real estate.

[15] Price per square foot construction costs are higher for multi-family units overall. (R.S. Means; Housing Consultants).

3. Proposed Growth Strategy – Jobs and Housing

The Jobs-Housing Connection Strategy provides a land use pattern for the region's future population and jobs. This approach to growth has been shaped through extensive consultation and coordination over two years with a multitude of stakeholders—including elected officials, city and county planning staff, community members, and local and regional housing, transportation, and equity advocates—to address the needs and aspirations of each Bay Area jurisdiction and to define priorities for guiding the region's development.

A variety of land use and transportation scenarios have been developed by MTC and ABAG to balance community and regional objectives and to achieve the region's Greenhouse Gas emissions reduction target. The Jobs-Housing Connection builds upon input received on previous scenarios as well as recent analysis addressing emerging demographic and economic trends to support the regional goals expressed in Section One—promoting a healthy economy, improving housing diversity and affordability, creating complete communities, and protecting the natural environment. The implementation strategy in Section Four will work in concert with the growth strategy to help realize these goals.

Growth Strategy Elements

The Jobs-Housing Connection Strategy's growth pattern is shaped by a handful of key elements: locally selected Priority Development Areas (PDAs), the region's core transit network, the Bay Area's network of open spaces and conservation land including Priority Conservation Areas (PCAs), and opportunities to increase access to job centers.

Priority Development Areas are nominated by local jurisdictions as appropriate places to concentrate future growth. PDAs are existing neighborhoods served by transit supported by local plans to provide a wider range of housing options along with amenities and services to meet the day-to-day needs of residents in a pedestrian-friendly environment. Local jurisdictions choose a Place Type for each PDA (such as regional center, transit neighborhood, or rural town), which provides a general

set of guidelines for the character, scale, and density of future growth and best matches the community vision for the area. The level of growth in each of the region's more than 200 PDAs reflects its role in achieving regional objectives. A key part of the PDA strategy is to move away from an unplanned "project-by-project" piecemeal approach, toward the creation of attractive complete communities that meet the needs of existing and new residents and workers.

A set of tables and maps later in this section describe the range of place types selected by communities for the PDAs throughout the region. The types are organized into high intensity, medium intensity, moderate intensity, and rural places. The first three categories of place types are established as regional policy; the rural types are currently evolving and guidelines may be added.

The region's *core transit network* and the services prioritized in the Draft Transportation Investment Strategy provide a strong foundation upon which to distribute future growth. Many Regional and City Centers include at least one station served by the region's major heavy- and light-rail systems—Bay Area

What is a Complete Community?

Creating complete communities is a key objective of the Jobs Housing Connection Strategy. A complete community is a place where people can walk to schools, grocery stores, libraries, clinics, and other local amenities, as well as frequent public transit connected to job opportunities and regional attractions. Complete communities reinforce unique cultural and social networks while providing a variety of housing options that meet our future needs. Many Bay Area communities have these features, and the region's coordinated planning and investment strategy can help extend these features to PDAs throughout the region.

Qualities of a Complete Community



Shared Public Spaces
Providing parks, plazas, and other spaces for gathering, recreation, and events
(Photo: City of Concord)



Housing Choices
Meeting the needs of an increasingly diverse and aging population
(Photo: City of Concord)



Shops and Services
Providing access to healthy food and services that meet unique community needs
(Photo: Creative Commons)



Complete Streets
Accommodating all travel modes; promoting active recreation and providing environmental benefits
(Photo: City of San Francisco)



Convenient Transit
Creating connections to job opportunities and key regional destinations
(Photo: neighborhoods.org)

Rapid Transit (BART), Caltrain, the San Francisco Muni Metro, and Valley Transportation Authority (VTA) light rail. PDAs along this core network will be nodes connecting the majority of the region's housing and jobs by 2040. Three planned heavy rail expansion projects – BART to Silicon Valley, BART to Antioch ("eBART"), and Sonoma-Marin Area Rail Transit (SMART) – provide an opportunity to more efficiently link residents to the region's major job centers. Targeted residential and commercial development around stations along these new corridors (reflecting local plans) can help ease the Bay Area's chronic housing shortage, improve the cost-effectiveness of new service, and preserve regional open space.

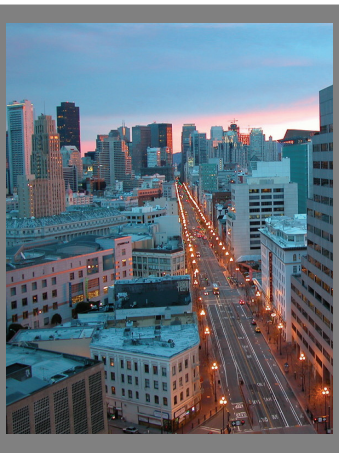
The *conservation, agricultural, and open space* lands that help define the Bay Area and sustain our quality of life provide "edges" for future growth. Locally identified Priority Conservation Areas (PCAs) are a critical part of this network and a mechanism for implementing the Jobs-Housing Connection Strategy. PCAs are areas of regional significance that have broad community support and an urgent need for protection. Since 2007, more than 100 PCAs have been nominated. PCAs will expand a regional greenbelt dedicated for preservation or protected by federal, state, and local policies. PCAs play a particularly strong role in implementing the growth strategy in the North Bay—where they are central to the character and economy of many communities.

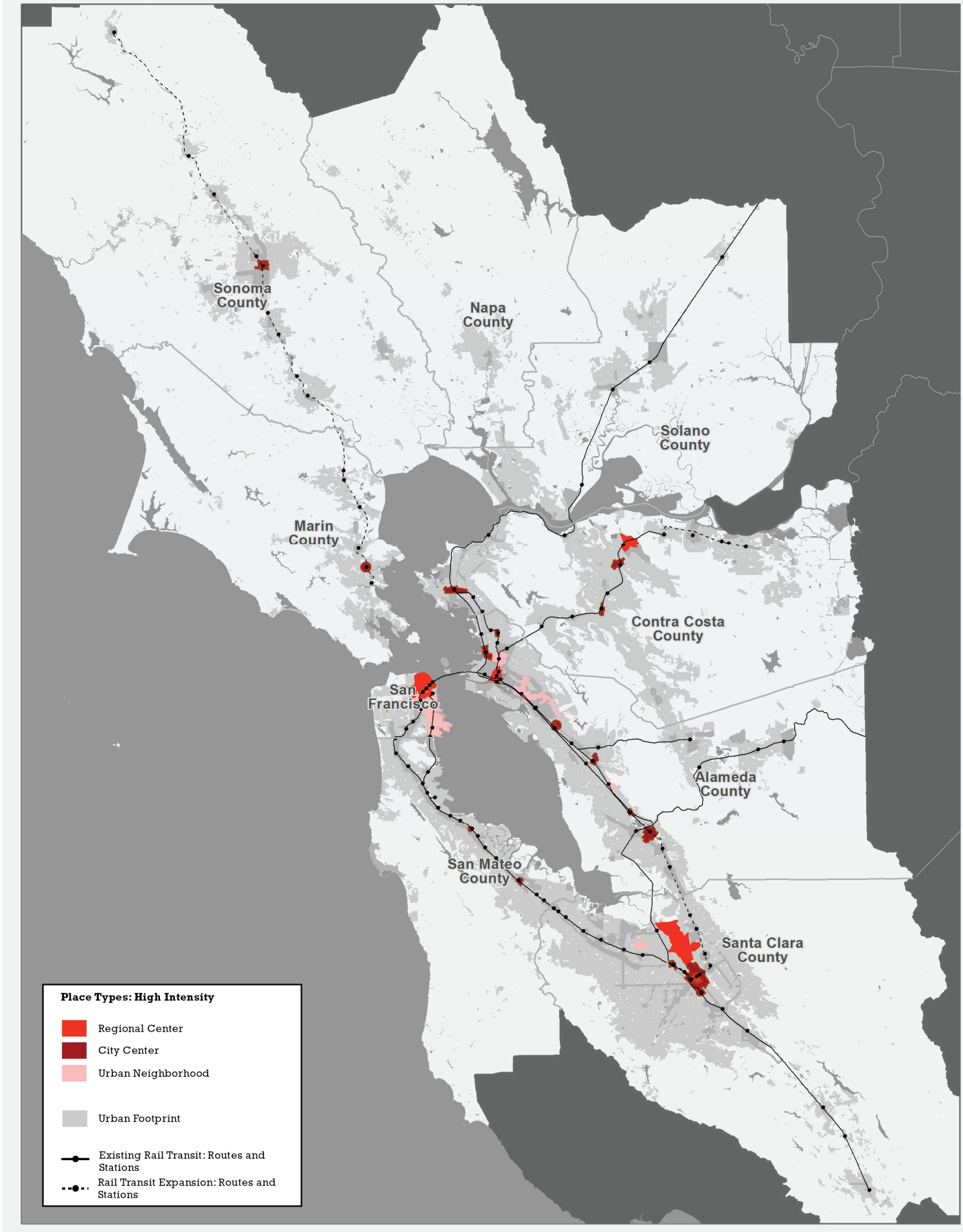
Increasing *access to job centers* for Bay Area residents has long been identified as a regional planning objective. To reinforce the Bay Area's existing strengths and areas of potential future growth, the strategy takes into account the location of clusters of knowledge sector industries—focusing on PDAs with excellent transit access.

Together, these elements set the stage for shaping the region's future growth pattern, and for reinforcing the intent of the ABAG Executive Board to support equitable and sustainable development by "maximizing the regional transit network and reducing GHG emissions by providing convenient access to employment for people of all incomes by distributing total housing growth numbers to: a) job-rich cities that have PDAs or additional areas that are PDA-like; b) connected to the existing transit infrastructure; and c) lack the affordable housing needed to accommodate low-income commuters."[16]

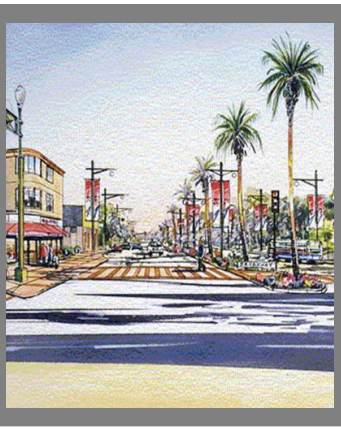
[16] ABAG Executive Board Meeting Summary Minutes, No. 381, p. 9. July 21, 2011. http://abag.ca.gov/abag/events/agendas/e091511a-Item%2006.A.pdf

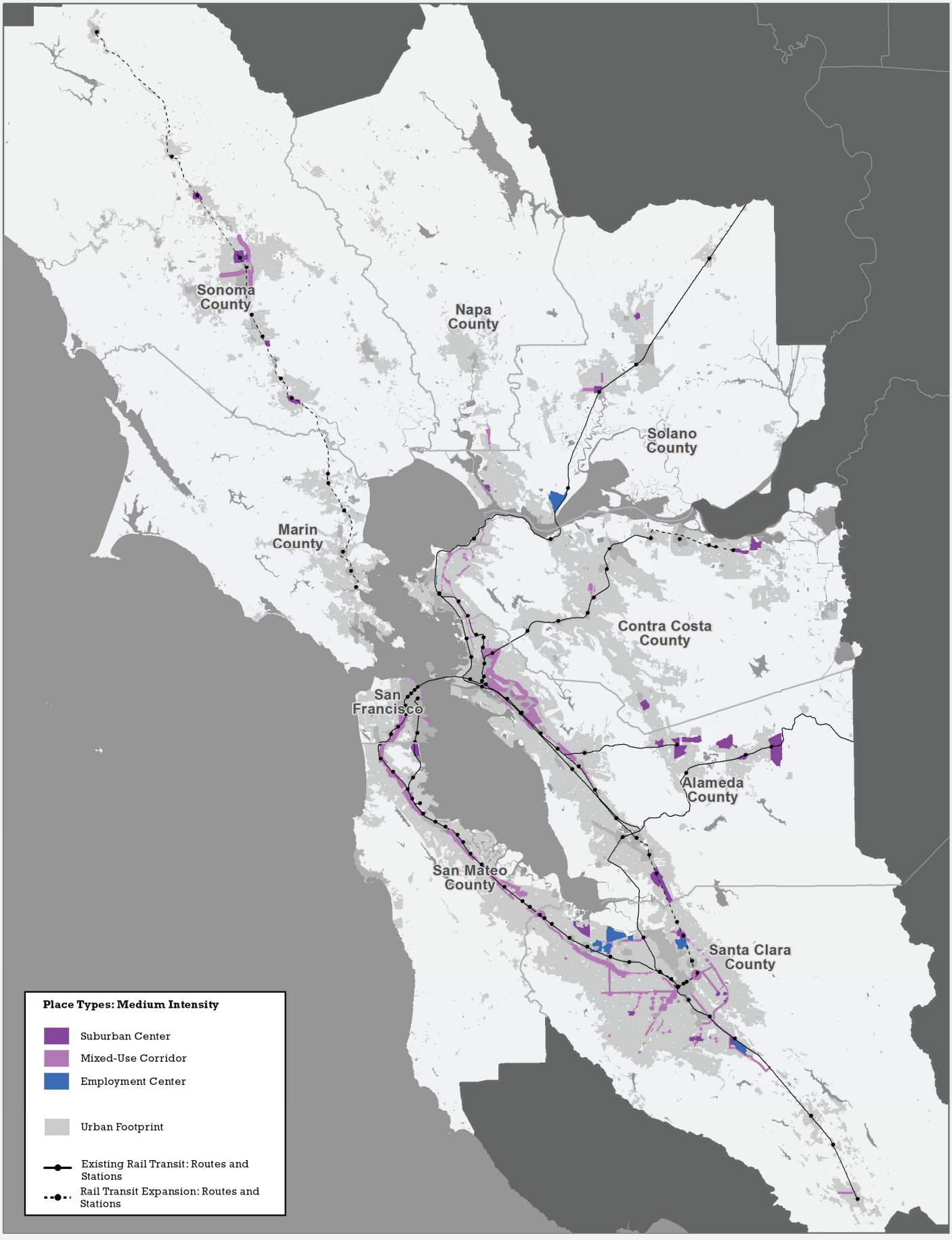
Place Types: High Intensity

Place Type		Description	Guidelines
Regional Center *Examples:* Downtown Oakland; Downtown San Francisco; Downtown San Jose		Primary center of economic and cultural activity for the region. Served by frequent, regional and inter-city rail transit with major sub-regional and local connections.	▪ 8,000-30,000 dwelling units ▪ 40,000-150,000 jobs ▪ High- and mid-rise offices, apartments, and condos; ground floor retail *New Projects* ▪ 75-300 dwelling units/net acre ▪ 5.0 net FAR
City Center *Examples:* Downtown Berkeley; Downtown Concord; Downtown San Rafael; Downtown Santa Rosa;		Sub-regional center of economic and cultural activity with some regional destinations. Served by frequent dedicated regional transit with connections to frequent sub-regional and local service.	▪ 5,000-15,000 dwelling units ▪ 5,000-30,000 jobs ▪ Mid- and low rise offices, apartments and condos; townhomes; some ground floor retail *New Projects* ▪ 50-150 dwelling units/net acre ▪ 2.5 Net FAR
Urban Neighborhood *Examples:* East Sunnyvale; San Francisco Eastern Neighborhoods; South Hayward BART Station Area		Residential areas with a mix of residential and local-serving retail uses. Served by frequent dedicated regional transit with connections to some sub-regional and local service.	▪ 2,500-10,000 dwelling units ▪ Mid and low-rise apartments and condos; townhomes; local retail in individual or mixed-use buildings *New Projects* ▪ 40-100 dwelling units/net acre ▪ 1.0 net FAR


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Place Types: High Intensity
Regional Center
City Center
Urban Neighborhood
Urban Footprint
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations

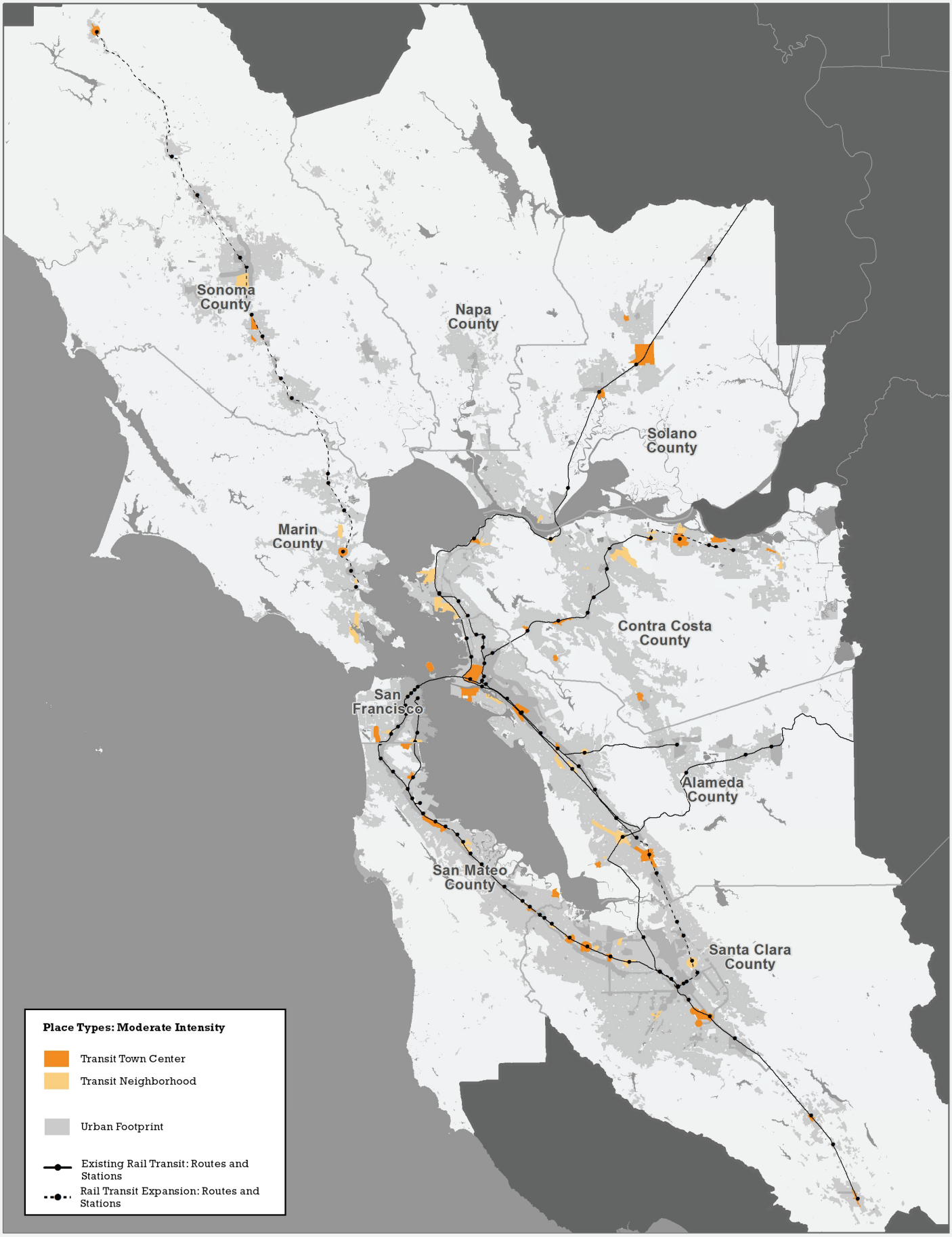
Place Types: Medium Intensity

Place Type		Description	Guidelines
Mixed-Use Corridor *Examples:* East 14th Street/Mission Boulevard; El Camino Real; San Jose-Camden Urban Village; San Pablo Avenue		Focus of local community and economic activity for areas without a distinct center. Served by sub-regional transit (in some cases dedicated) and local transit.	▪ 2,000-5,000 Units ▪ 750-1,500 Jobs ▪ Mid and low-rise apartments and condos; townhomes; small lot single family adjacent to corridor; local retail in individual or mixed-use buildings *New Projects:* ▪ 25-60 dwelling unit/net acre ▪ 4.0 net FAR
Suburban Center *Examples:* Dublin Transit Center; Livermore BART Station Area		Sub-regional center of economic activity with local amenities in traditionally suburban areas, with some sub-regional destinations. Served by dedicated regional transit with strong connections to sub-regional and local service.	▪ 2,500-10,000 Units ▪ 7,500-50,000 Jobs ▪ Mid- and low rise homes and offices, townhomes; limited ground floor retail *New Projects:* ▪ 35-100 dwelling unit/net acre ▪ 4.0 net FAR
Employment Center *Examples*: Mountain View-East Whisman; San Jose-Old Edenville		Region and sub-regional serving districts focused on employment-generating uses. Served by dedicated regional or sub-regional transit (in some cases dedicated) and some local transit. Can also be served by employer shuttles.	▪ Mid and low-rise office and flex commercial buildings; some ground floor local-serving retail *New Projects* ▪ 1.5 net FAR

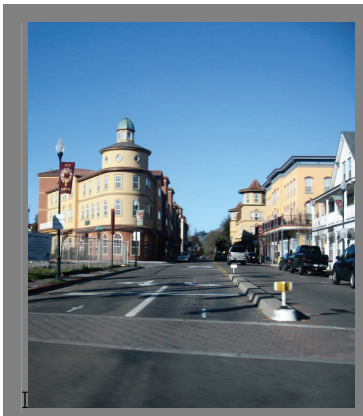
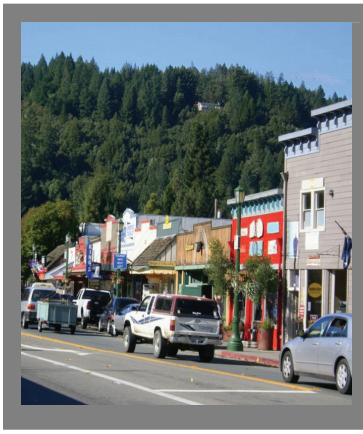

Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Place Types: Medium Intensity
Suburban Center
Mixed-Use Corridor
Employment Center
Urban Footprint
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations

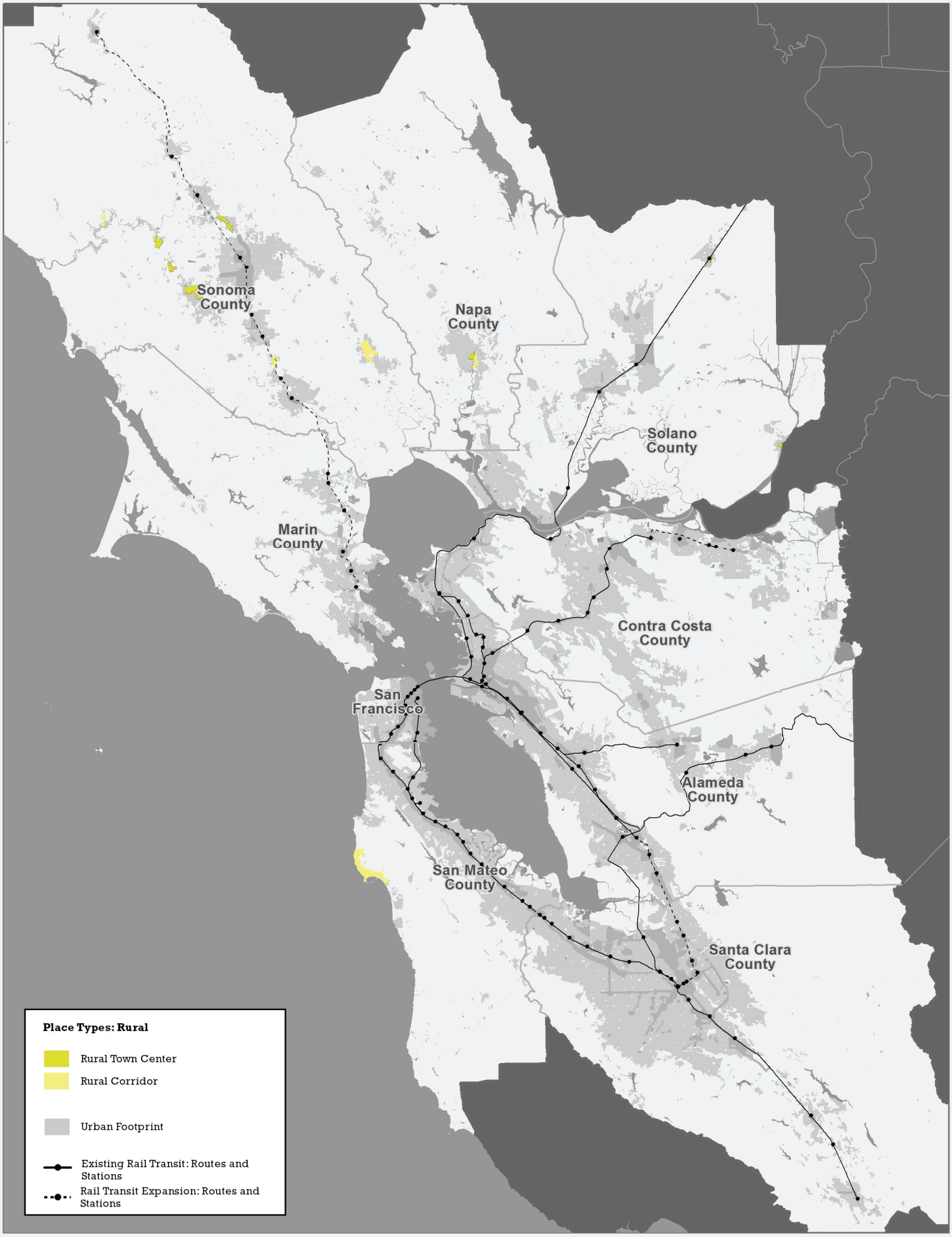
Place Types: Moderate Intensity

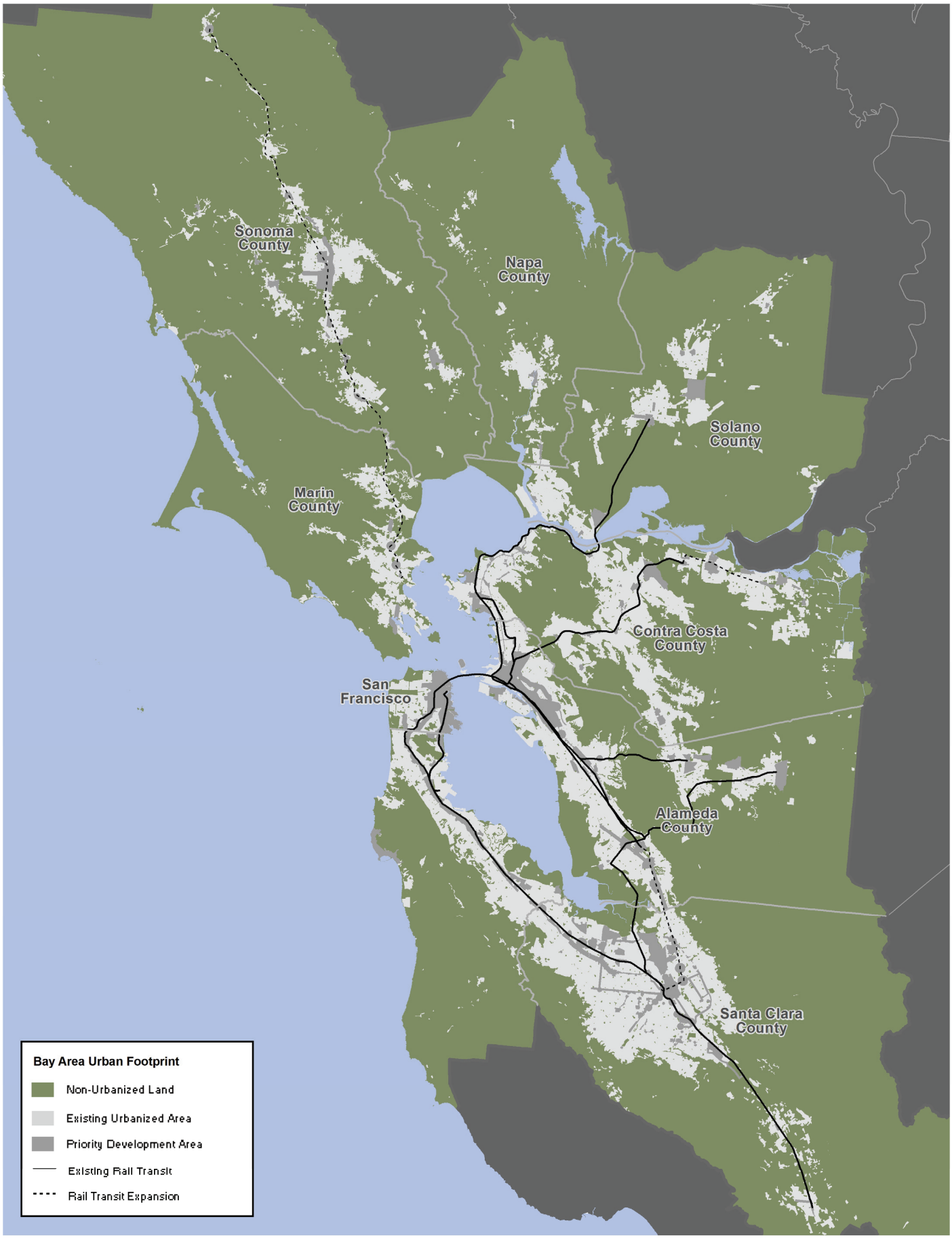
Place Type		Description	Guidelines
Transit Town Center *Examples:* Fremont Irvington District; Downtown Lafayette; Downtown Mountain View; Fairfield/Vacaville Train Station Area;		Local center of economic and cultural activity with a range of housing options and local amenities. Served by dedicated regional or sub-regional transit with strong connections to local transit.	▪ 3,000-7,500 dwelling units ▪ 2,000-7,500 jobs ▪ Mid- and low rise office, apartments and condos; townhomes; small lot single family; ground floor retail *New Projects:* ▪ 20-75 dwelling units/net acre ▪ 2.0 net FAR
Transit Neighborhood *Examples:* Castro Valley BART; Santa Rosa Roseland; Sunnyvale Tasman Crossing		Residential neighborhoods with a variety of housing options and to local retail and services. Served by dedicated regional or sub-regional transit, with some connections to local transit.	▪ 1,500-4,000 Units ▪ Low-rise apartments and condos; townhomes; limited local retail *New Projects* ▪ 20-50 dwelling unit/net acre ▪ 1.0 net FAR

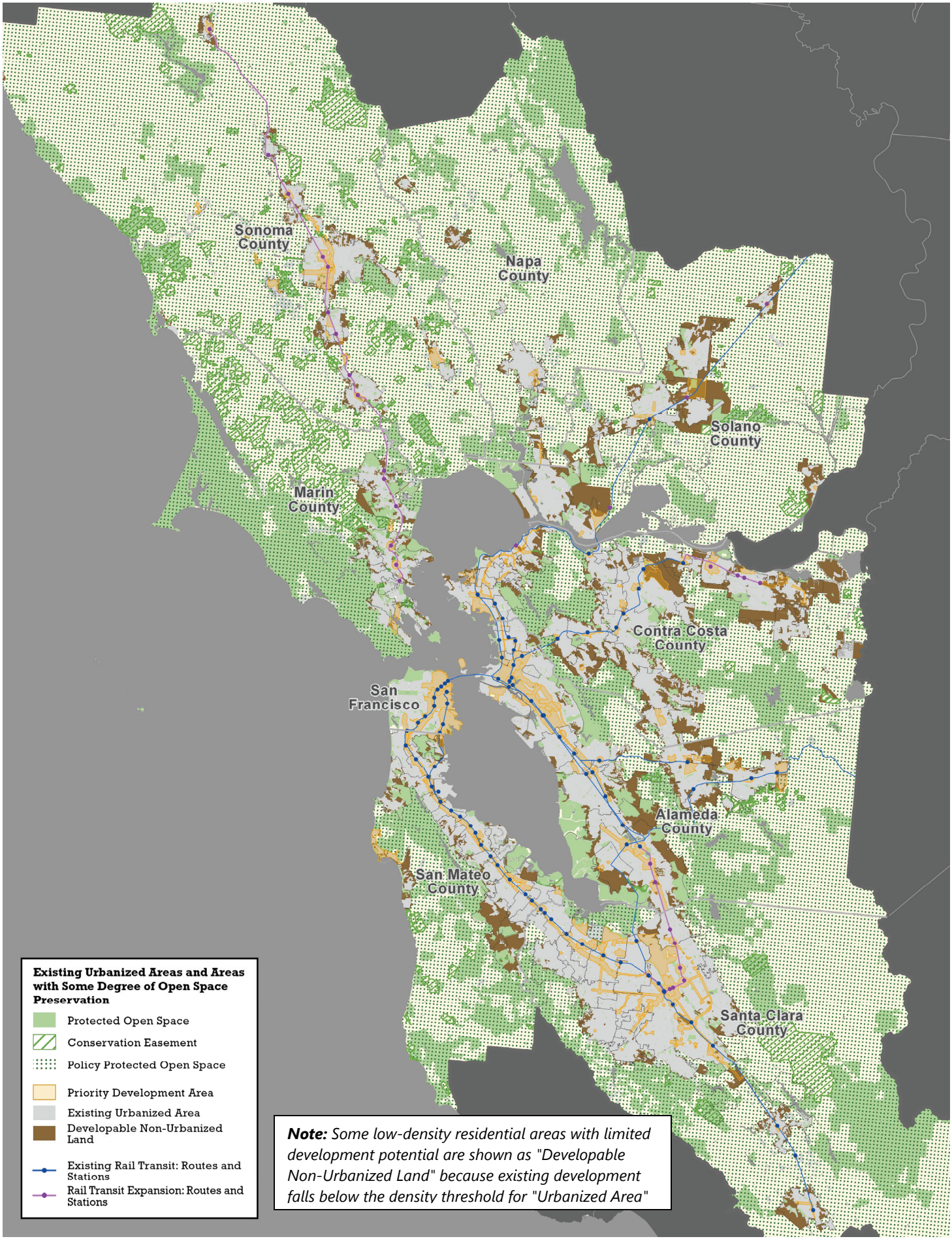

Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Place Types: Moderate Intensity
Transit Town Center
Transit Neighborhood
Urban Footprint
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations

Place Types: Rural Town Centers and Corridors

Place Type		Description	Guidelines
Rural Town Center *Examples:* Downtown Dixon; Graton; Sebastapol;		Existing centers of economic and community activity surrounded by agricultural lands or protected conservation lands.	▪ Within identifiable town center of rural community ▪ Focus on improved access to local services and non-motorized transportation
Rural Corridor *Examples:* Sonoma County - The Springs		Existing community and commercial corridor for a rural community without an identifiable center.	▪ Clearly defined edges surrounded by conservation or agricultural lands ▪ Focus on improved access to local services and non-motorized transportation


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Place Types: Rural
Rural Town Center
Rural Corridor
Urban Footprint
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
Santa Clara County
Bay Area Urban Footprint
Non-Urbanized Land
Existing Urbanized Area
Priority Development Area
Existing Rail Transit
Rail Transit Expansion


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Existing Urbanized Areas and Areas with Some Degree of Open Space Preservation
Protected Open Space
Conservation Easement
Policy Protected Open Space
Priority Development Area
Existing Urbanized Area
Developable Non-Urbanized Land
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations
Note: Some low-density residential areas with limited development potential are shown as "Developable Non-Urbanized Land" because existing development falls below the density threshold for "Urbanized Area"

3.1 Distribution Approach

To distribute future development, **regional growth factors** were applied to address the changing economic, demographic, and housing needs of the region. Regional growth factors are based in part on: the growth potential of areas supported by transit and existing infrastructure; where housing is needed to support access to jobs; and where economic clusters support job growth. A detailed description of the technical methodology is provided in Appendix B.

Jobs

The approach for distributing new employment growth accounts for job growth by sector and is linked to transit infrastructure and local input. Employment growth is organized under three major groups: knowledge-sector jobs, population-serving jobs, and all other jobs. Knowledge-sector jobs, such as information technology companies, legal or engineering offices, or biotechnology firms, are expected to grow based on current concentration, specialization, and past growth as well as transit service and access. A map of the weighted knowledge strength index used to distribute knowledge-sector jobs within each county is shown later in this section. Population-serving jobs, such as retail stores, or restaurants, are expected to grow in a manner reflecting the distribution of future household growth. All other jobs, including government, agriculture and manufacturing, are expected to grow according to the existing distribution of jobs in each of these sectors. (See Appendix B for additional details on the employment distribution methodology.)

Housing

The strategy for locating new housing begins with local plans at the county, city, and PDA levels. Housing growth in each place was then adjusted to ensure that regional goals were advanced based on the following five regional growth factors: 1) level of transit service; 2) vehicle-miles traveled (VMT) per household[17]; 3) employment by 2040; 4) low-wage workers commuting from outside each place; and 5) housing value. More housing growth was directed to locations where the transit

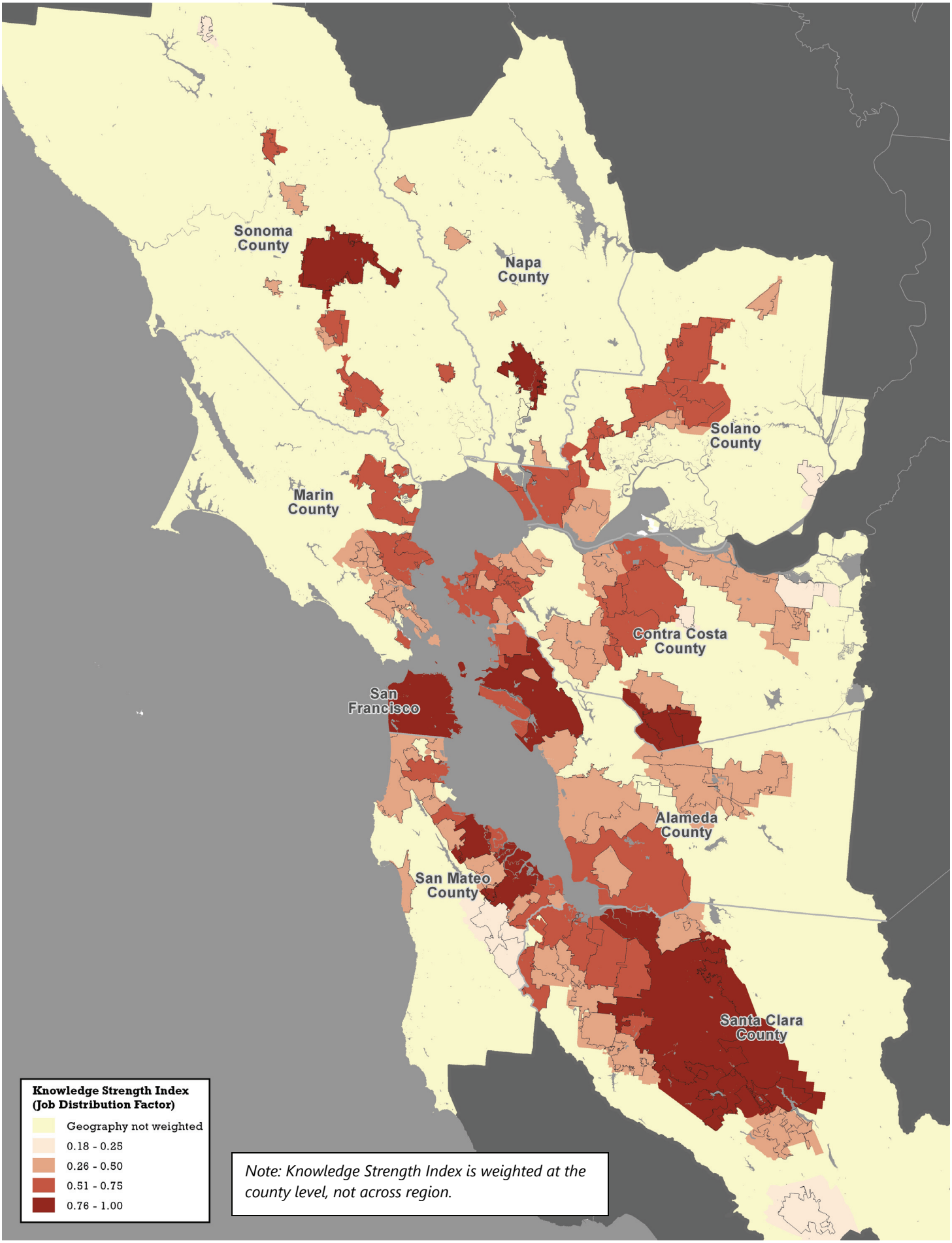
[17] Vehicle miles traveled (VMT) per household reflects both the total number of auto trips and the average distance of auto trips per household; greater VMT per household reflects greater auto usage and less transit usage, biking and walking to travel for daily needs.

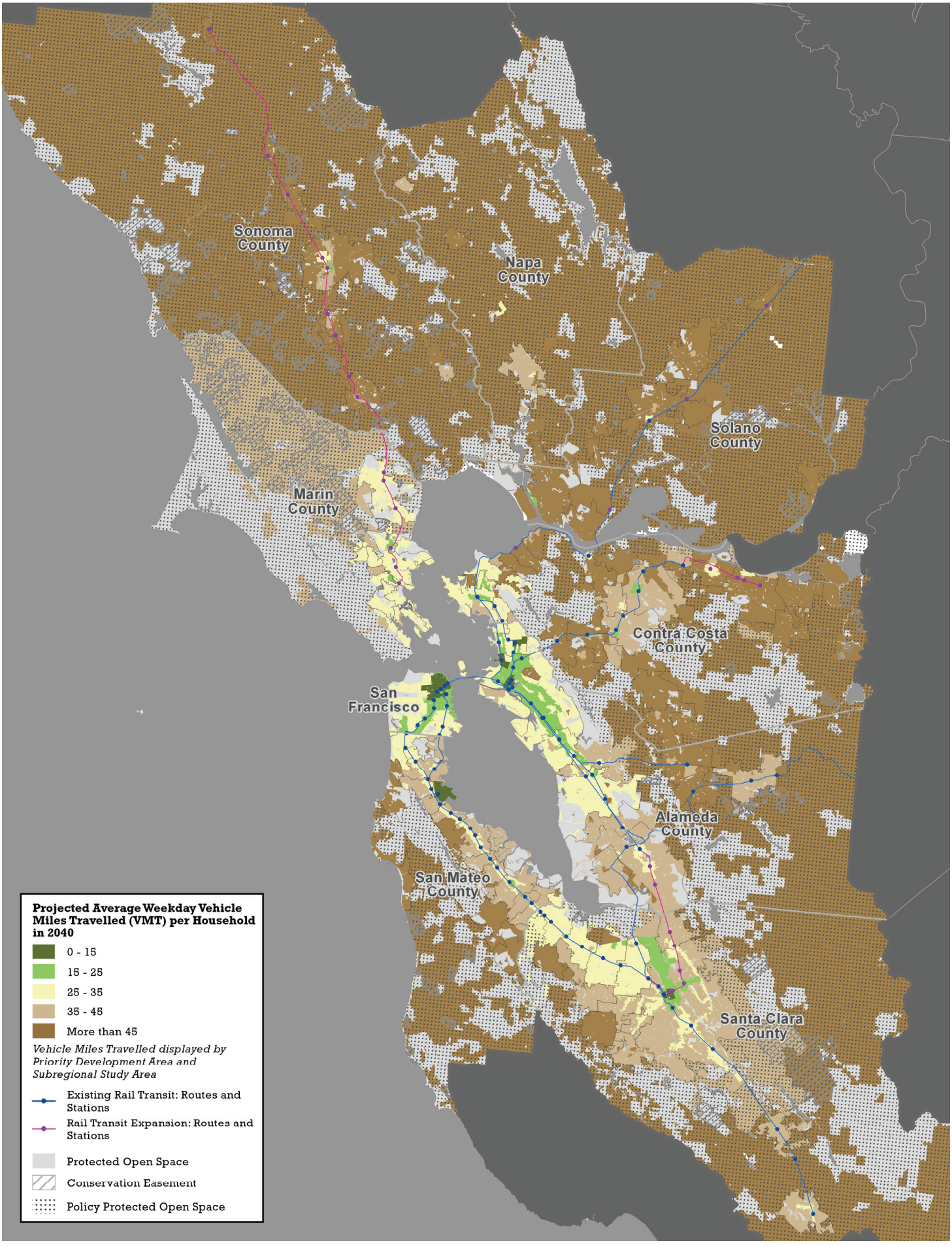
system can be utilized more efficiently, where workers can be better connected to jobs, and where residents can access high-quality services.

Housing growth was next adjusted to account for anticipated levels of growth outside PDAs, including that on presently undeveloped land, and to ensure that no county or city's proposed growth substantially deviates from local plans. The distribution accounts for current high vacancy rates by city by factoring absorption of existing vacant units to accommodate future households. It also assumes an increase in group housing, reflecting the high rate of growth in the older population in the coming decades. The VMT per household, employment, low-wage in-commuting, and housing value factors used to distribute housing throughout the region are shown later in this section.

3.2 Future Growth Pattern

Reflecting the strategy's emphasis on the core regional transit network and connecting homes and jobs, San Francisco, San Mateo, Santa Clara, and Alameda counties account for the majority of housing growth (77%) and job growth (76%). Within these counties, the Bay Area's three regional centers—San Francisco, San Jose, and Oakland—accommodate 42% of housing growth and 38% of total job growth by 2040. Corridors in the inner Bay Area, including El Camino Real/The Grand Boulevard, San Pablo Corridor, and East 14th–International Boulevard, also represents a major share of both housing and job growth, accommodating 19% of regional housing and 11% of regional job growth. This concentrated growth pattern will help leverage the region's existing fixed guideway transit system and inner-Bay Area improvements identified in the RTP Investment Strategy, including Caltrain electrification, BART to San Jose, and service enhancements to existing routes.


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Knowledge Strength Index (Job Distribution Factor)
Geography not weighted
0.18 - 0.25
0.26 - 0.50
0.51 - 0.75
0.76 - 1.00
Note: Knowledge Strength Index is weighted at the county level, not across region.


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Projected Average Weekday Vehicle Miles Travelled (VMT) per Household in 2040
0 - 15
15 - 25
25 - 35
35 - 45
More than 45
Vehicle Miles Travelled displayed by Priority Development Area and Subregional Study Area
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations
Protected Open Space
Conservation Easement
Policy Protected Open Space

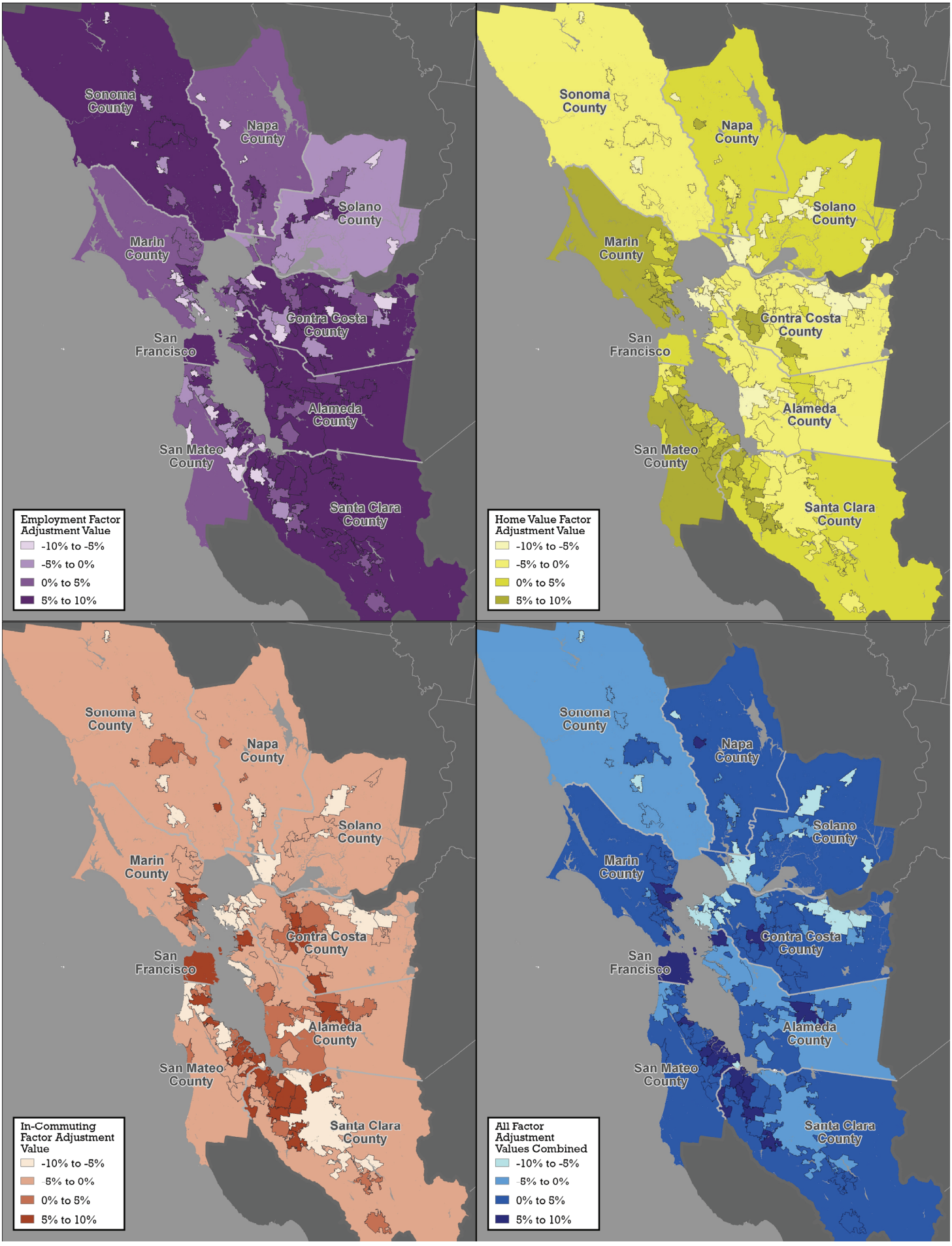

Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Employment Factor Adjustment Value
-10% to -5%
-5% to 0%
0% to 5%
5% to 10%
Home Value Factor Adjustment Value
-10% to -5%
-5% to 0%
0% to 5%
5% to 10%
In-Commuting Factor Adjustment Value
-10% to -5%
-5% to 0%
0% to 5%
5% to 10%
All Factor Adjustment Values Combined
-10% to -5%
-5% to 0%
0% to 5%
5% to 10%

Table 3.1 Employment and Housing Growth by County

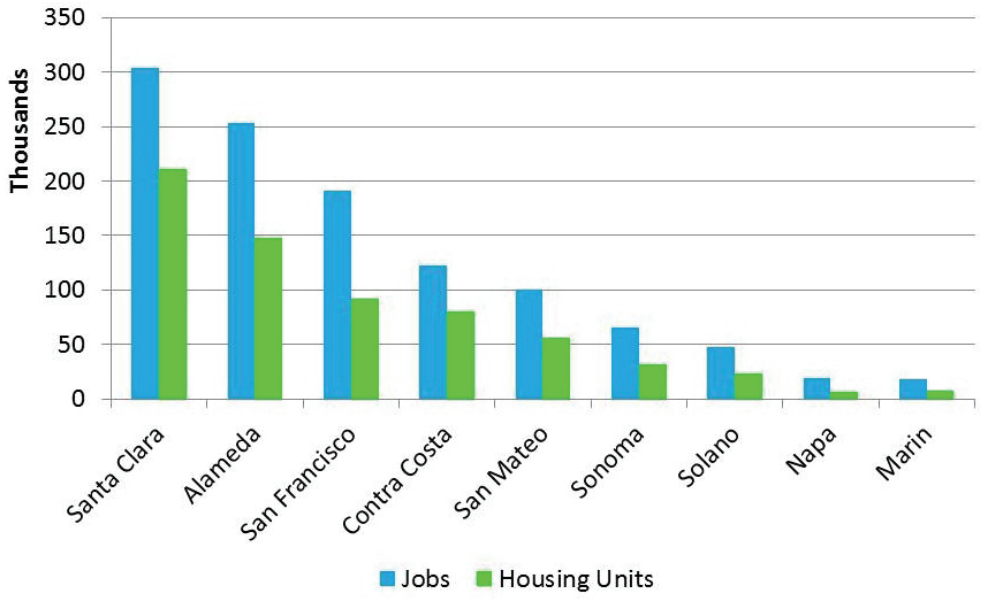
County	Employment				Housing Units				Households			
	2010	2040	2010-2040 Total	2010-2040 %	2010*	2040	2010-2040 Total	2010-2040 %	2010	2040	2010-2040 Total	2010-2040 %
Alameda	694,450	947,630	253,190	36%	582,550	730,530	147,980	29%	545,140	705,290	160,150	29%
Contra Costa	344,920	467,000	122,080	35%	400,260	480,400	80,130	23%	375,360	463,070	87,700	23%
Marin	110,730	129,130	18,390	17%	111,210	118,720	7,510	9%	103,210	112,020	8,810	9%
Napa	70,650	89,530	18,880	27%	54,760	60,810	6,050	15%	48,880	56,290	7,410	15%
San Francisco	568,720	759,470	190,740	34%	376,940	469,350	92,410	29%	345,810	447,250	101,440	29%
San Mateo	345,200	445,310	100,110	29%	271,030	326,730	55,700	22%	257,840	315,730	57,900	22%
Santa Clara	926,260	1,229,800	303,530	33%	631,920	843,110	211,190	36%	604,200	819,130	214,920	36%
Solano	132,350	179,900	47,560	36%	152,700	175,520	22,820	19%	141,760	168,650	26,890	19%
Sonoma	192,010	257,450	65,430	34%	204,570	236,440	31,870	19%	185,830	220,690	34,870	19%
REGION	**3,385,300**	**4,505,220**	**1,119,920**	**33%**	**2,785,950**	**3,445,940***	**660,000***	**27%**	**2,608,020**	**3,308,110**	**700,090**	**27%**

**2010 values include seasonal units; Regional 2040 and growth totals include 4,340 seasonal units that were not distributed throughout the region*

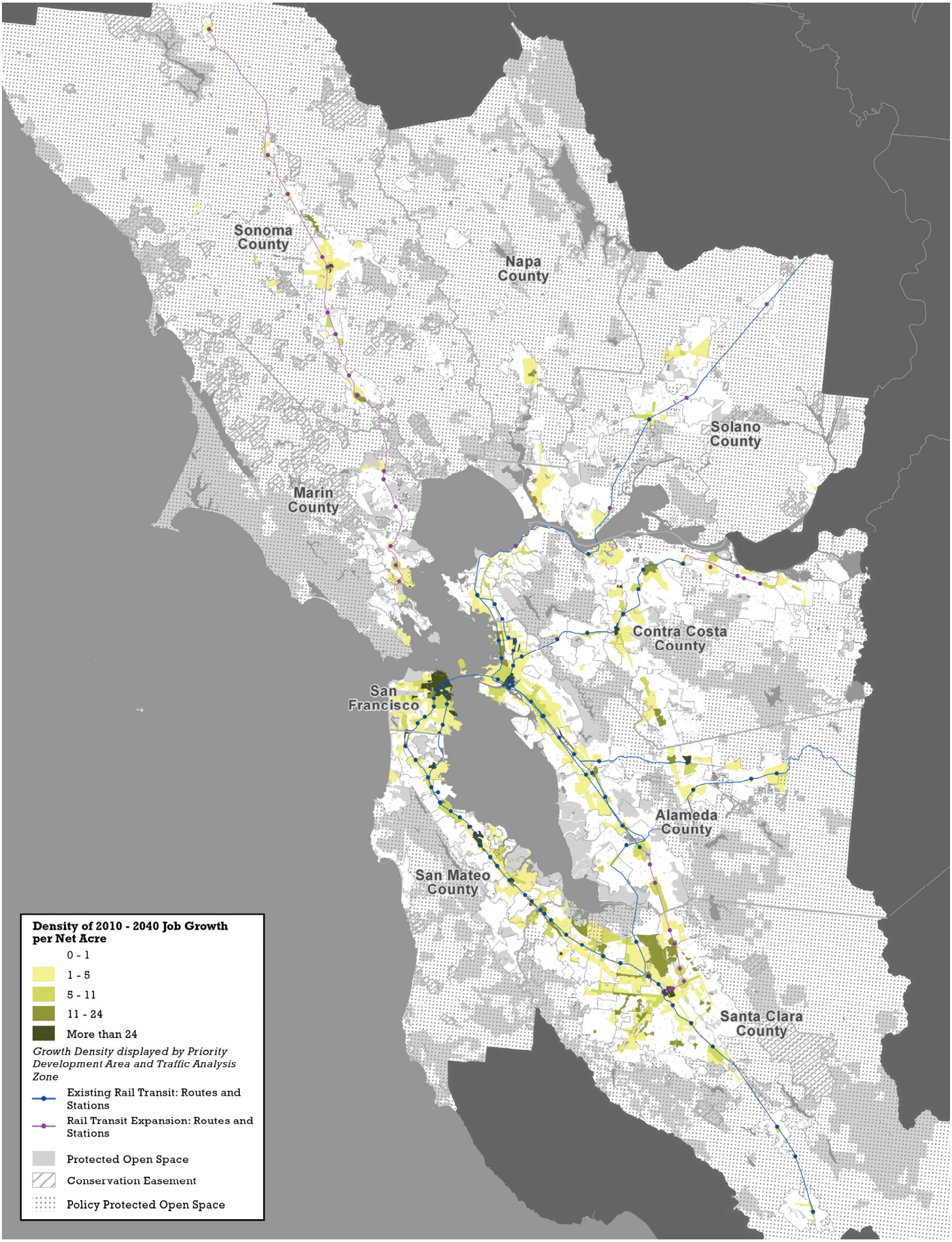
Contra Costa County accounts for 11% of the region's new jobs and 12% of its new homes. Concord, Richmond, Pittsburg, and Walnut Creek, all with PDAs centered around BART stations, take on the largest shares of the county's growth, at 23%, 12%, 9%, and 9% respectively. PDAs in the county will take on 65% of the housing growth and 57% of the job growth.

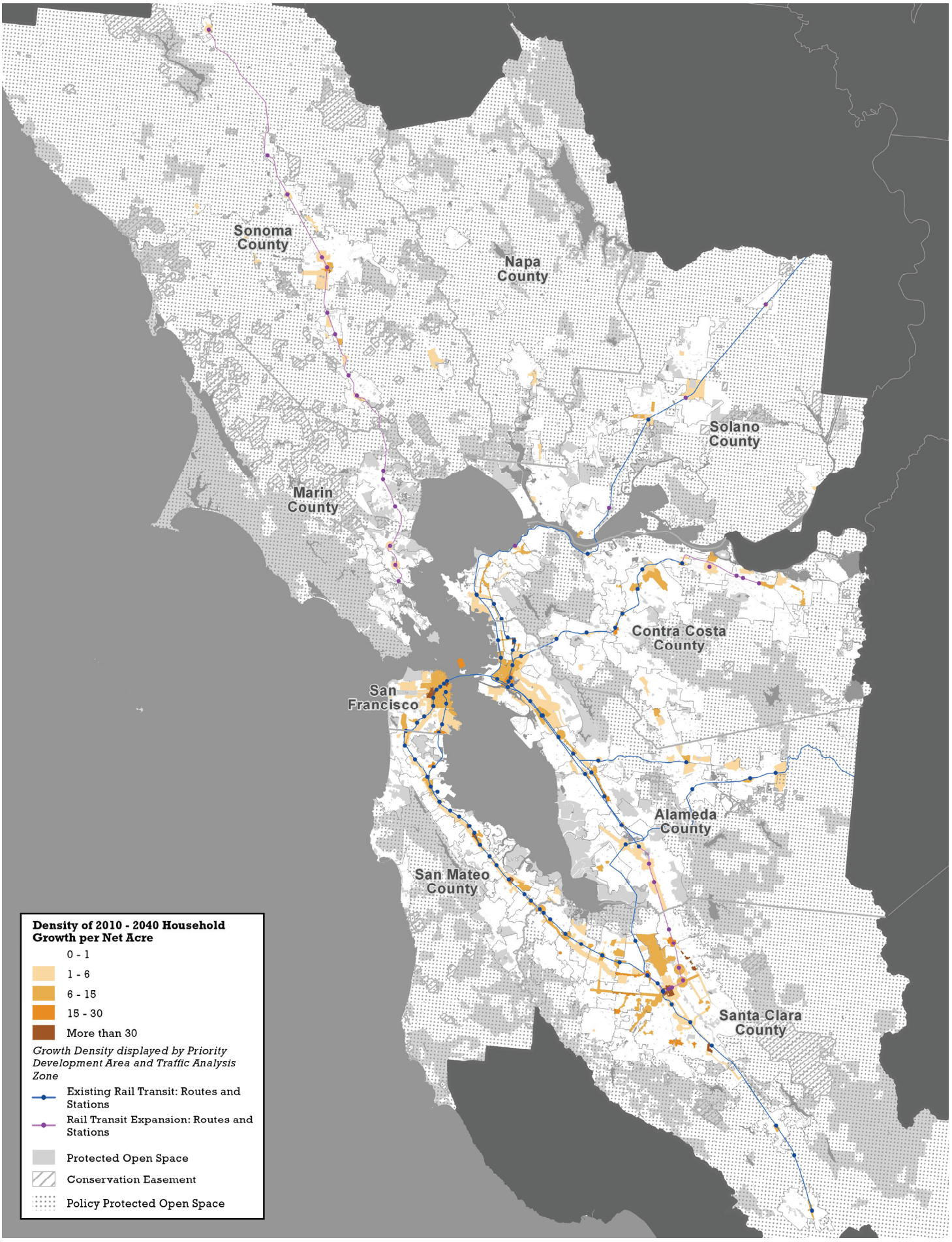
Major suburban employment centers in Alameda and Contra Costa Counties, including Concord, Walnut Creek, and the Tri-Valley communities of Dublin, Pleasanton, Livermore, and San Ramon, account for over 8% of the region's new jobs and nearly 9% of its new homes.

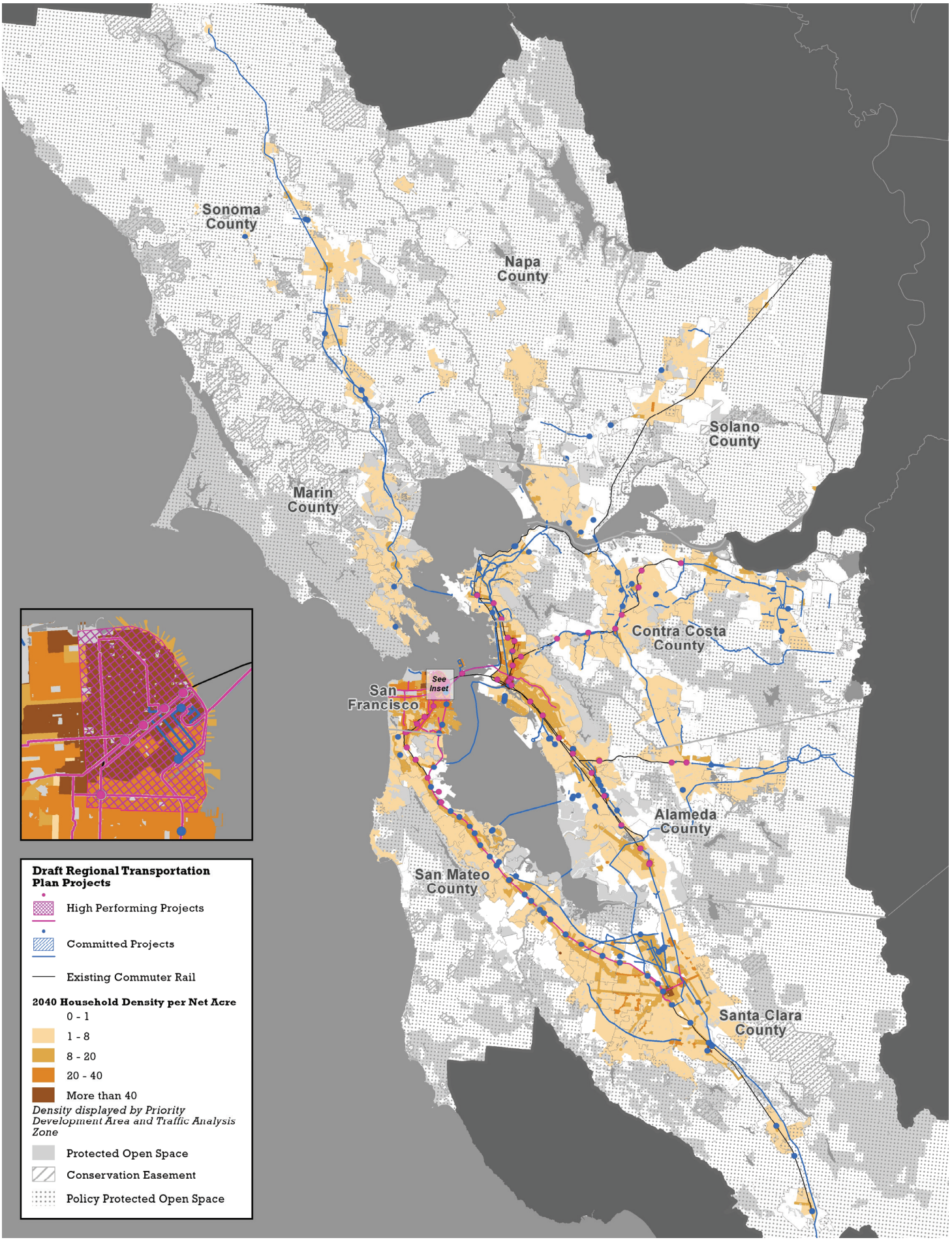
Figure 3.1. Employment and Housing Unit Growth by County



With more limited transit access and fewer PDAs, North Bay Counties—Marin, Napa, Solano and Sonoma—are expected to take on a much smaller share of regional growth, accounting for 10% of new households and 13% of new jobs. Much of this growth will be focused into PDAs such as Downtown Santa Rosa, Petaluma, Fairfield, and Vallejo. In Marin, 22% of new jobs and 38% of new housing are anticipated in PDAs, while the share is 18% and 41% in Napa, 33% and 65% in Solano, and 56% and 72% in Sonoma. By concentrating growth into the inner Bay Area and communities with frequent transit service, the growth strategy helps North Bay communities to maintain their rural


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Density of 2010 - 2040 Job Growth per Net Acre
0 - 1
1 - 5
5 - 11
11 - 24
More than 24
Growth Density displayed by Priority Development Area and Traffic Analysis Zone
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations
Protected Open Space
Conservation Easement
Policy Protected Open Space

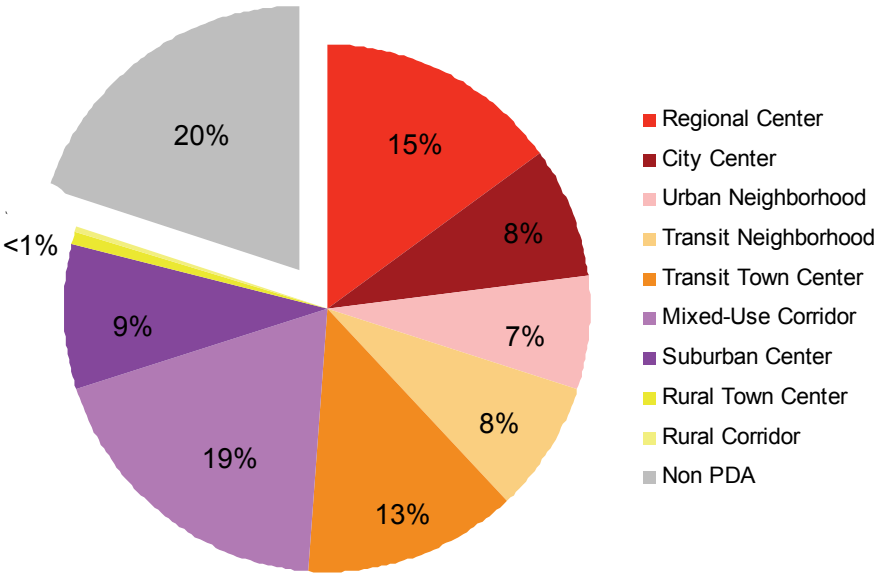

Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
San Francisco
Alameda County
San Mateo County
Santa Clara County
Density of 2010 - 2040 Household Growth per Net Acre
0 - 1
1 - 6
6 - 15
15 - 30
More than 30
Growth Density displayed by Priority Development Area and Traffic Analysis Zone
Existing Rail Transit: Routes and Stations
Rail Transit Expansion: Routes and Stations
Protected Open Space
Conservation Easement
Policy Protected Open Space


Sonoma County
Napa County
Solano County
Marin County
Contra Costa County
See Inset
San Francisco
Alameda County
San Mateo County
Santa Clara County
Draft Regional Transportation Plan Projects
High Performing Projects
Committed Projects
Existing Commuter Rail
2040 Household Density per Net Acre
0 - 1
1 - 8
8 - 20
20 - 40
More than 40
Density displayed by Priority Development Area and Traffic Analysis Zone
Protected Open Space
Conservation Easement
Policy Protected Open Space

and small-town character. While accommodating a very limited amount of new growth, Rural centers and corridors will enhance the pedestrian environment and access to local service in the traditional downtowns of many of these communities.

Overall, well over two-thirds of all regional growth over the next 30 years is allocated within Priority Development Areas. PDAs are expected to accommodate 80% (or over 525,570 units) of new housing, and 66% (or 744,230) of new jobs. As a result, small cities, single family neighborhoods, and rural areas throughout the Bay Area have a very small share of the overall growth by 2040 and are expected to retain the same scale and character over the next 28 years.

Figure 3.2. Share of Housing Unit Growth by Place Type



3.3 Outcomes

The Jobs-Housing Connection growth strategy is a major departure from the dispersed growth patterns of prior decades. The benefits of this growth strategy will be felt both locally and regionally. New growth within PDAs will enhance existing neighborhoods and give people more choices, while helping to reduce traffic congestion, provide housing that more people can afford, promote accessibility and public health, and protect our open spaces.

Housing Diversity and Affordability

The range of housing options available to Bay Area residents is anticipated to increase significantly over the next 30 years. Townhomes and multi-family condominiums and apartments are projected to make up nearly three-quarters of new homes during this period. While a variety of factors will determine the relative affordability of Bay Area homes, if obstacles to infill development can be cleared, production of a broader array of housing products should increase the availability of homes at lower price points. Single family homes will continue to make up more than half of the region's housing stock in 2040.

Open Space Protection

By focusing more than 80% of the region's new housing in little more than 4% of its land, the growth strategy makes efficient use of available infrastructure while protecting the region's greenbelt from development. Nearly 99% of future homes are projected to be built within the existing urban footprint, preserving valuable conservation lands while reversing the previous century's dramatic trend toward development in the region's greenbelt.

Active Transportation

This focused pattern of development will promote better public health through improvements in pedestrian and bicycle accessibility: the amount of time people spend walking and biking for transportation increases from 9 minutes per day to 11 minutes, through improvements in walking and biking facilities and by locating housing closer to services.

Greenhouse Gas Emissions

The concentration of growth into walkable communities along the region's extensive transit network will have the added benefit of climate protection: by 2040, per capita greenhouse gas emissions from transportation are projected to decline by 17% from today, exceeding the region's target of 15%.

Table 3.2: Summary of Regional Outcomes

Issue	2010-2040 Trend	Benefits and Challenges
Housing Diversity and Affordability	• Townhouses and multi-family units make up 73% of new housing	• Retains existing single-family neighborhoods • Meets evolving housing demand • Requires clearing obstacles to infill development
Open Space Protection	• 99% of new housing within urban footprint	• Requires extension of existing open space policy protections and • Key natural resources, economic assets, and recreation opportunities preserved
Active Transportation	• Time spent walking and bicycling increases 22%	• Benefits public health, but falls short of regional target • Depends upon successful implementation of complete communities approach
GHG Emissions	• 17% reduction in per capita transportation-related emissions	• Exceeds 15% regional goal

Regional Transportation and Land Use Performance Targets

To fully assess how the region will benefit by this concentrated growth pattern, MTC and ABAG adopted a set of performance targets for the Jobs-Housing Connection Strategy and the Regional Transportation Plan in January 2011. The performance targets set goals for regional transportation and land use planning, including climate protection, adequate housing, healthy and safe communities, open space and agricultural preservation, equitable access, economic opportunity, and transportation system effectiveness. This set of targets includes state-mandated targets for greenhouse gas emissions reductions and housing need, and federal standards air quality. In addition to these targets, a set of equity indicators were developed with the assistance of the Regional Equity Working Group and adopted to assess the distribution of the projected impacts of the Strategy and RTP on low- and non-low-income households, particularly in communities of concern[18].

Overall, the Jobs-Housing Connection Strategy and RTP make substantial progress in meeting regional goals. However, additional efforts and strategies are required to improve equity and overall performance. The draft Transportation Investment Strategy of the RTP outlines several transportation investment strategies and policies that help achieve the targets. In addition, the Implementation Framework section of this report outlines a number of strategies that will help ensure economic prosperity, sufficient housing production, equitable access to opportunities, and open space preservation. A detailed overview of the joint indicators can be found on the OneBayArea website.[19]

[18] Communities of Concern have been identified by MTC where there are currently multiple overlapping populations of concern related to transportation, housing, and land use: minority residents, low-income residents, people who don't speak English well or at all, households with no car, seniors 75 and over, people with disabilities, single-parent households, and over-burdened renters. Most of the communities of concern are in the region's urban core, but there are also communities of concern located in suburban areas around the region.

[19] http://onebayarea.org/plan_bay_area/targets.htm

4. Proposed Implementation Strategy

The Jobs-Housing Connection Strategy will be realized through collaboration between regional agencies, cities and counties, special districts, and the business and non-profit communities to achieve concrete outcomes. The implementation strategy that follows builds upon the integrated approach to regional planning described in Section One and the growth strategy outlined in Section Three to provide a set of actions aimed at placing the region on a path toward long-term sustainability. These actions are presented as a proposal for discussion and implementation of the Strategy's goals.

4.1 Goals

The four goals introduced in Section One provide a framework for organizing the region's approach to implementing the Jobs-Housing Connection Strategy. Goals are over-arching objectives for improving the future prospects of Bay Area communities, strengthening our environment, and enhancing our economy. Each goal provides the basis for an "action area" under which a set of implementation actions are grouped.

Goal One: Increase the Amount, Affordability, and Diversity of Housing

As the Bay Area's population ages, the share of single-person household's increase, and the demographic composition of families' change, new housing must match changing needs. Despite rising demand for housing around transit and in urban centers, obstacles to infill development coupled with rising housing prices have hindered the region's ability to provide a more diverse range of housing choices. In the future, the Bay Area will require more multifamily housing accessible to jobs and services to support the development of rental and affordable housing.

Goal Two: Create jobs to maintain and expand a prosperous and equitable regional economy

As the Bay Area and the nation recover from the recent recession, maintaining a globally-competitive region and capturing a greater share of future economic growth is a foundation for preserving and enhancing our region's unique character and quality of life. Identifying sectors of strength and strategic importance and providing the region's residents with the tools to thrive in

these and other emerging industries provides a path forward. Cultivating the conditions for innovation—by strengthening our urban and city centers, supporting research, and reducing the cost of doing business—can position the region to capitalize on the opportunities of the future. The Bay Area must also create more living wage jobs by expanding the range of activities supported by the knowledge sector and building up industries that are poised for long-term stability of our labor force.

Goal Three: Create a Network of Complete Communities

Growing demand for affordable access to services, increased awareness of the health impacts of sedentary lifestyles, and the challenge of climate change have all helped drive efforts to create complete communities that allow residents to meet their daily needs close to home and conveniently reach regional destinations. Communities with walkable streets, shops close to homes, and public open spaces, can improve wellbeing, reduce threats to physical safety, increase access to economic opportunities, and facilitate greater civic participation. Building complete communities requires focused initiatives to improve schools, infrastructure and services, and to link homes with affordable transportation—including transit, walking, and bicycling.

Downtown Station Area Plan (Santa Rosa)

Santa Rosa's historic downtown, long the civic core of the Bay Area's fifth largest city, suffered major disinvestment in the mid-20th century. With the announcement that a Sonoma-Marin Area Rail Transit (SMART) would be located in downtown, the city began to plan for a future that celebrates downtown's unique character and capitalizes on an opportunity to focus new jobs and housing in a walkable location accessible by multiple transportation modes. With assistance from an MTC Station Area Planning Grant, the city developed and adopted a Downtown Station Area Specific Plan. The plan built upon existing momentum toward revitalizing downtown by identifying land use, circulation, infrastructure and urban design policies to stimulate growth around what is projected to be the busiest SMART station. While the recent recession slowed projects planned for downtown, many of these projects have returned as the city and region's economy recover. Designated a City Center PDA, Downtown Santa Rosa is a focal point for implementing the Jobs Housing Connection Strategy in Sonoma County and the North Bay.



Source: City of Santa Rosa

Goal Four: Protect the Region's Natural Environment

The region's network of open space, natural habitats and agricultural lands provide a wide range of environmental, social and economic benefits. Conserving habitats is an important part of safeguarding our limited water resources, preserving biodiversity, and protecting scenic landscapes. The region must continue to protect and expand the region's conservation lands to supporting our long-term sustainability and preserve the qualities that attract a world-class workforce and visitors from around the globe.

4.2 Implementation Actions

Implementing the Jobs Housing Connection's growth strategy and goals will require a set of parallel, well-coordinated actions by the Bay Area's public, private and non-profit sectors. Actions range from continued collaboration between local and regional agencies to plan for PDAs and preserve PCAs, to state legislation creating new tools to support infill development following the loss of redevelopment agencies, and changes in federal laws that create disincentives to producing multi-family and affordable housing.

The Implementation Actions provide a special focus on Priority Development Areas (PDAs). For PDAs to drive the region's future growth, they must be attractive, affordable places to live and work. A 2010 survey of Bay Area residents by MTC found that the top factors determining housing choice were proximity to key activities—work, family, friends, and school—followed by price. As the composition of households change, the relative importance of specific activities also changes, but the desire for the fundamental elements of a complete community—access to daily necessities, quality services, transportation options, a variety of housing choices, a safe environment, and social networks—remain

While the economic, environmental, and social benefits of the PDA approach have been articulated, building complete communities on the ground involves improved (or new) infrastructure and services that must be funded and maintained. The communities that take on the vast majority of the region's growth will need financial and technical support to guide what for many is a new approach to development. Over the long-term, concentrating housing and jobs in PDAs may pay for itself through reduced public service costs, greater return on government investments, and increased

innovation. In the near-term creative implementation actions backed by firm commitments are needed to position PDAs to thrive.

The implementation actions below are intended to initiate a regional discussion and set the stage for partnership. The actions will continue to be developed (and in some cases begin to be implemented) during the next year before a more solidified set is provided in the adopted Sustainable Communities Strategy in April 2013. Many of the revised actions are anticipated to inform a joint Bay Area legislative strategy pursued by a delegation led by MTC and ABAG on behalf of the region's jurisdictions and non-profit organizations. This strategy will focus on both state and federal legislation, and be conducted in partnership with Bay Area elected officials.

Because the SCS will be updated in 4 year cycles, implementation focuses on short term ongoing actions. It also includes initiatives—some of which can be completed within the period of this SCS and others that will be implemented over the medium to long-term but can be initiated in the short-term. Potential partnerships are identified for some actions, and additional partnerships and funding strategies are anticipated to emerge through discussion. In addition to actions responding to the four goals, a set of actions addressing comprehensive planning and funding is included.

Table 4.1 Implementation Actions Summary

Action Area	Action	
Pursue Comprehensive Planning and Funding	1.1	Implement the One Bay Area Grant
	1.2	Complete PDA Growth Strategies
	1.3	Prioritize PDAs in the Regional Transportation Investment Strategy
	1.4	Work with the State to Adopt Legislation Supporting Infill
	1.5	Coordinate Local Efforts to Advance Development in PDAs
	1.6	Provide PDA Implementation Tools
	1.7	Identify Additional Funding for PDA Planning and Implementation
	1.8	Create a Transit Priority Policy for Public Buildings
	1.9	Create a Regional Strategy for Tax Reform
	1.10	Ensure Coordination Between Regional Agencies
Increase the Amount, Affordability, and Diversity of Housing	2.1	Update Zoning to Reflect RHNA Commitment to PDAs
	2.2	Create a Regional Affordable Housing Trust Fund
	2.3	Increase Stability of Existing PDA Residents
	2.4	Expand Housing Choices for Seniors
	2.5	Facilitate land banking in PDAs
	2.6	Pursue State Legislative Change Supporting Housing Availability and Choice
	2.7	Pursue Federal Legislative Change Supporting Housing Availability and Choice
Create Jobs to Maintain and Expand a Prosperous and Equitable Regional Economy	3.1	Identify and Support Industries of Opportunity
	3.2	Align Workforce Investment, Training, and Community Economic Development with Industries of Opportunity
	3.3	Establish a Bay Area Centers of Innovation Initiative
	3.4	Inventory and Prioritize Industrial Land
	3.5	Create an Economic Development Strategy Addressing the Needs of Distressed Suburban Communities
	3.6	Pursue Federal Legislative Change to Support Economic Development
Create a Network of Complete Communities	4.1	Incorporate Community Vitality Policies into PDA Planning
	4.2	Shift Parking Policies in PDAs to Support Infill
	4.3	Create a PDA-focused initiative to improve educational performance
	4.4	Improve School Accessibility
	4.5	Implement Joint Use Agreements
	4.6	Increase Park Funding for PDAs
	4.7	Integrate Community Health into PDA Planning
	4.8	Coordinate Regional and Community Disaster Preparedness
	4.9	Integrate Sea Level Rise into Land Use and Transportation Planning
	4.10	Address the Potential Air Quality Impacts of Infill

Action Area	Action	
		Development
Protect the Region's Natural Environment	5.1	Initiate Priority Conservation Areas Pilot Program
	5.2	Identify Resources to Preserve the Conservation Lands Network
	5.3	Complete the Region's Three Major Multi-use Trails
	5.4	Extend the Expiration Dates of Existing Urban Growth Boundaries and other Policy Protections
	5.5	Develop a Regional Agricultural and Farmland Protection Plan

Action Area One: Pursue Comprehensive Planning and Funding

Overcoming obstacles to infill development and providing stability to existing low and moderate income households are essential tasks that support all four goals. For the Jobs Housing Connection Strategy and PDAs to succeed in the coming decades, a set of short-term actions are needed to overcome these obstacles. A first step toward implementation is organizing the region around a set of actions that can create the underlying conditions necessary for investment, job creation, and improvements in community wellbeing in PDAs and region-wide. These include:

1.1. Implement the One Bay Area Grant Program

The One Bay Area Grant (OBAG) will distribute $320 million over a four year period among the region's Congestion Management Agencies (CMAs) to fund locally-tailored projects that support the Jobs-Housing Connection Strategy. These projects will buttress the major regional investments identified in the Draft Transportation Investment Strategy—many of which reinforce or expand service in PDAs. In San Francisco, Alameda, Contra Costa, San Mateo and Santa Clara counties, at least 70% of OBAG funds will support investments in PDAs. In the four North Bay counties, at least 50% of funds will support projects in PDAs, and a portion will support a pilot program to strengthen Priority Conservation Areas. In advance of receiving OBAG funds, each CMA will develop a county PDA growth strategy for prioritizing projects—including criteria for land use, affordable housing, connectivity, access to employment, and other factors.

Potential Partnerships: County Congestion Management Agencies (CMAs), Local Jurisdictions, ABAG, MTC
Progress: Funded

1.2 Complete PDA Growth Strategies

Each Bay Area county's Congestion Management Agency (CMA) will prepare a PDA Growth strategy outlining a process for evaluating and funding projects in Priority Development Areas through the One Bay Area Grant. Completing the Growth Strategies will set the stage for timely selection and implementation of funded OBAG projects, and will demonstrate a firm commitment to improving infrastructure and mobility in PDAs—which in turn can build confidence on the part of employers, investors and state and federal funders. ABAG will support development of these growth strategies.

Potential Partnerships: County Congestion Management Agencies (CMAs), Local Jurisdictions, ABAG, MTC
Progress: Funded and Scheduled for Completion

Railroad Avenue Specific Plan

The East Contra Costa BART extension (eBART) will provide service from the Pittsburg-Bay Point BART station eastward through the cities of Pittsburg, Antioch, and Oakley. MTC resolution 3434—which requires a minimum number of housing units around new stations—provided the impetus for an ambitious plan for the area around the planned eBART station at Pittsburg's Railroad Avenue. The product of extensive public outreach and evaluation of potential development options, the Railroad Avenue Specific Plan articulates a vision for a walkable, mixed-use center of activity located at the crossroads of Pittsburg's historic core and its more recently developed neighborhoods.

The densities included in the Plan support resolution 3434 targets while providing an approach for increasing housing choices and non-motorized transportation options tailored to unique community opportunities and challenges. The effort was assisted by a planning grant from MTC and ABAG.



1.3: Prioritize PDAs in the Regional Transportation Investment Strategy

The Draft Transportation Investment Strategy proposed for the Regional Transportation Plan (RTP) focuses on strengthening and expanding transit service and basic infrastructure in many of the region's most densely populated PDAs. The combination of new service and "fix it first" transportation investment can make PDAs more attractive to businesses and residents, and increase access to opportunities for low-income, elderly, and transit-dependent households. In addition to supporting PDAs with strong existing densities, the expansion projects prioritized in the investment

strategy will provide an impetus for investment in PDAs that contain the few remaining opportunities for large-scale new development with convenient access to regional transit.

Potential Partnerships: CMAs, Transportation Service Providers, ABAG, MTC
Progress: Draft Regional Transportation Investment Strategy Completed

1.4: Work with the State to Adopt Legislation Supporting Infill Development

Infill development in PDAs is anticipated to comprise most of the region's long-term growth. The complexity of infill development—site acquisition and assembly, financing, and project-level environmental review–has traditionally limited the pace of growth in urban districts. This has become even more difficult with the elimination of Community Redevelopment Agencies in California. New state-supported mechanisms are required to comprehensively plan for and facilitate infill development and create the community improvements required to implement the Jobs-Housing Connection Strategy. Discussions underway to create either a new entity or set of tools to immediately support infill must be quickly advanced to set the stage for crafting and passing legislation.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, Legislators, Non-Profits

1.5: Coordinate Local Efforts to Advance Development in PDAs

A major impediment to housing production and infill development in the Bay Area is the often lengthy project entitlement process. In many cases, the amount of time required for planning and environmental review leads projects to miss the time period during an economic cycle when demand exists for new housing or commercial space. In the near-term, ABAG, MTC, and non-profit partners can work with local jurisdictions to implement proven strategies for advancing infill development in PDAs. Among these strategies are station area plans, reduced parking requirements, expedited processing, and programmatic Environmental Impact Reports (EIRs) that eliminate the need for individual project EIRs. ABAG and MTC will continue to support these efforts through PDA planning grants and technical assistance.

In addition, as part of the EIR for the RTP and SCS, ABAG and MTC are exploring an approach that will provide "tiering" benefits for transportation and land use projects consistent with these plans. If a viable approach is identified, it can be implemented through the EIR.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, Non-Profits
Progress: PDA and Station Area plans supporting these objectives are underway or adopted

1.6: Provide PDA Implementation Tools

Implementing the *Jobs Housing Connection* Strategy, RHNA, and state GHG targets will require significant, ongoing coordination between local jurisdictions, ABAG, and other regional agencies. To set the stage for infill development in PDAs, some communities have adopted Specific Plans, zoning ordinances, and other incentives. Many jurisdictions are likely to need additional tools and resources to create a scale, intensity, and character of development that supports community aspirations as well as meeting Place Type targets. ABAG can assist communities by providing a set of implementation tools that address community involvement, urban design standards, zoning, parking, complete streets, displacement, and the process for updating Housing and other key General Plan Elements. To help drive development that leverages regional and local infrastructure and other major investments, ABAG can tailor the tools to each Place Type. The tools would provide a foundation on which jurisdictions would layer the unique socioeconomic, architectural, and cultural qualities of communities to set the stage for the adoption and implementation of plans. These tools would build upon existing support provided by PDA planning grants and the PDA technical support program.

Potential Partnerships: Local Jurisdictions, ABAG, MTC

1.7: Identify Additional Funding Sources to Support PDA Planning and Implementation

Focusing future growth into PDAs would support many state, regional, local, and civic objectives simultaneously—including greenhouse gas emissions reduction (both mobile and stationary source), increased access to transit and services, and walkable neighborhoods among others. Jurisdictions and the state can explore opportunities to dedicate portions of funds aimed at achieving these objectives specifically to PDAs, where implementation can be most efficiently and effectively coordinated. Non-profit funders can be engaged as well to identify opportunities to integrate the PDA framework into programming and funding plans.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, Legislators, Relevant State Agencies

1.8: Create a Transit Priority Policy for Public Buildings

To support PDAs and implementation of GHG reduction goals, the region's jurisdictions, in partnership with state and federal agencies, can establish a policy requiring that locations within ½ mile of frequent regional transit service (or within PDAs if such service is not available) are given priority when locating local, regional and state public facilities such as administrative offices, schools, universities, and public safety buildings. This approach brings services closer to residents of PDAs, provides the critical mass needed to create active streets and support local services, and focuses sectors with a high propensity for transit ridership close to major transit investments. ABAG, MTC, and the region's jurisdictions can support efforts already underway to reform the state and local criteria used to locate new schools—which for many years have inadvertently pushed them toward large parcels with limited access to surrounding communities.

Potential Partnerships: Local Jurisdictions, Special Districts, Legislators, ABAG, MTC

Grand Boulevard Initiative

The Grand Boulevard Initiative is a unique process involving the coordination of land use, transportation, and infrastructure planning among 16 cities along 43 miles of roadway. The GBI focuses on El Camino Real—a historic arterial (and former highway) that stretches down the Peninsula from Daly City to San Jose. In 2007, jurisdictions engaged in parallel planning for portions of El Camino Real developed a set of guiding principles and initiated a long-tern process for transforming the arterial into a "Grand Boulevard" that provides smooth traffic flow while also offering an inviting pedestrian environment and providing priority for transit vehicles and bicycles. Managed by a 45 member task force with public, private, and non-profit representations, the Initiative has produced strategies for improving transit service, increasing housing choice and strengthening the 16 activity centers along the corridor, and an infrastructure needs assessment and financing plan. With 13 Priority Development Areas and convenient access to 20 regional rail stations, the corridor will play a central role in successfully implementing the Jobs-Housing Connection Strategy and RTP. MTC and ABAG have supported the GBI with grant funding, complementing public and private funding provided by members of the initiative partnership.



Source: Project for Public Spaces

1.9: Create a Regional Strategy for Tax Reform

Our state and local tax structure remains an obstacle to creating a balanced regional growth pattern. The current approach to taxation creates incentives to attract development that maximize sales tax revenues at the expense of housing and the growth of industries capable of expanding the opportunities of residents and the employees of local businesses. A variety of best practices exist for addressing this challenge, but a regional discussion is needed to create solutions tailored to the unique needs of the Bay Area. Implementation of the Jobs-Housing Connection Strategy and RTP presents a new opportunity to discuss, evaluate, and identify potential approaches to redesigning our tax structure to achieve regional objectives without undermining local control. This can begin with the formation of a working group charged with analyzing and proposing options for wider discussion among regional and state stakeholders.

Potential Partnerships: Local jurisdictions, ABAG, MTC, Legislators, Non-Profits

1.10: Ensure Coordination Between Regional Agencies

The initiation of Plan Bay Area and establishment of the Joint Policy Committee have set the stage for improved coordination between ABAG, MTC, BAAQMD, and BCDC. As plans and policies are developed over the next several years by each agency, continued coordination is critical to eliminating duplication and ensuring that these plans and policies work in concert to achieve shared regional objectives. A concrete plan for achieving coordination is being developed, and can be advanced in the near term to closely link parallel planning efforts.

Potential Partnerships: JPC, BAAQMD, ABAG, MTC, BCDC

Action Area Two: Increase the Amount, Affordability, and Diversity of Housing

Our approach to planning, funding, and building housing will need to shift to adapt to our region's changing housing needs, in particular increasing housing production and affordability. The growth pattern in the Jobs-Housing Connection Strategy begins to address these challenges, but a coordinated set of actions is needed to provide the increased range of housing choices envisioned by this pattern. These actions include:

2.1: Update Zoning to Reflect Regional Housing Needs Allocation (RHNA) Commitment to PDAs

The 2014-2022 RHNA will allocate as much as 70% of new housing into PDAs, which will trigger rezoning in many jurisdictions to comply with its allocation. This is an essential first step to focusing growth into the communities that have agreed to accommodate the bulk of the region's housing. To help facilitate this process, communities can adopt resolutions endorsing focusing RHNA allocations into PDAs in plan updates. ABAG can help support zoning updates by providing the tools described in action 1.3.

Potential Partnerships: Local Jurisdictions, ABAG

2.2: Create a Regional Affordable Housing Trust Fund

The Transit Oriented Affordable Housing (TOAH) fund provides early funding for the acquisition of land for affordable housing development, which typically must be in place before state and federal subsidies can be attracted for a subsidized housing development. Because the program is a partnership of public, private and non-profit investors, regional funds (administered through MTC) can be leveraged to produce significantly larger impacts than an initiative funded primarily with public dollars. More money however is needed.

A carefully designed Regional Affordable Housing Trust Fund would provide much-needed funding for affordable housing development and infrastructure improvements in central PDA locations, while ensuring that all jurisdictions continue to contribute to meeting regional housing needs. The Trust would require that a) affordable housing trust funds be redistributed within a balance of urban and suburban labor markets, and b) require all participating cities to adopt conforming Inclusionary Zoning Ordinances that includes zoning for a minimum number of affordable units.

The Regional Housing Trust would be an optional program funded by cities that approve housing projects that do not meet RHNA criteria. Cities that contribute to the fund would receive partial RHNA credit for their contribution, and cities that accept additional affordable housing would be awarded trust monies to leverage other funding sources for affordable housing development and associated infrastructure improvements.[20] The Trust would also prioritize investments so that affordable housing subsidies are provided within the same labor market as the contributing city.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, HCD, Affordable Housing Advocates, Residential Home Builders, TOAH Fund investors.
Progress: TOAH Funded (additional funding recommended)

2.3: Increase Stability of Existing PDA Residents

Putting in place policies to retain existing and create new affordable housing in PDAs as development proceeds is critical to securing the long-term diversity of communities and access to opportunities for residents of communities into which investment will flow. ABAG can work with other regional and state agencies to develop guidance for incorporating anti-displacement policies into the plans and investment priorities that emerge in response to the Jobs-Housing Connection Strategy. This can range from requirements attached to funding for infrastructure and planning to regional housing incentives to support local efforts to reduce displacement, including community engagement, zoning, and job creation strategies. A first step toward this is the integration of anti-displacement criteria related to communities of concern into the PDA growth strategies developed by CMAs. ABAG and MTC will provide guidance for creating these criteria.

Potential Partnerships: Local Jurisdictions, CMAs, ABAG, MTC, Non-Profits

2.4: Expand Housing Choices for Seniors

By 2040 over 2.1 million residents are expected to be 65 and over. Many seniors will demand new multi-family housing with specialized services and amenities that cater to their needs, while others

[20] The Sacramento Housing Agency provides an example of an affordable housing trust fund. This agency administers both a city and a county trust fund that raises revenue for affordable housing through fees for nonresidential development. No general fund monies are involved. Between 1993 and 2001, over 1,000 housing units were developed with city trust funds, and over 1,200 units were constructed with county trust funds. City trust fund monies have leveraged a total capital investment of $153 million while the county trust has leveraged $114.4 million. Overall, the total Trust Fund generates $10 in additional economic activity for every $1 spent by the fund. *Establishing a Local Housing Trust Fund*. (Institute for Local Government), February 2007.

choose to remain in their homes. The Bay Area can support senior housing choices by developing a range of public and private supportive housing models such as assisted living residences and continuing care retirement communities; modifying zoning codes to expand choices for older adults and others, including accessory dwelling units, multi-family rental units near transit, shopping, and other amenities; assisting aging homeowners with limited incomes by providing property tax relief programs, using housing vouchers to help aging renters' afford to age in place; and expand the Home and Community Based Services Medicaid waiver program to provide services for older residents in their homes or in centralized locations. (Medicaid and Medicare funding can be used to cover nursing services that help older renters in multifamily settings access preventative care, avoid unnecessary hospitalizations, and shorten hospital stays, creating a net savings in health costs while improving quality of life).

Potential Partnerships: ABAG, County Health Departments and Housing Authorities, Jurisdictions, Non-Profits

2.5: Facilitate Land Banking in PDAs

Many local governments have already taken steps to establish quasi-governmental entities, or land banks, to acquire foreclosed or tax-delinquent properties to ensure that they can later be put to publicly-beneficial uses following the recovery of the local land market. ABAG can work with jurisdictions to replicate successful implementation of land banking, and identify opportunities to link other affordable housing efforts (such as Transit Oriented Affordable Housing Fund) to land banking.

Potential Partnerships: Local Jurisdictions ABAG, County Housing Authorities, Non-Profits, TOAH Fund Investors

2.6: Pursue State Legislative Change Supporting Housing Availability and Choice

A regional legislative agenda supported by the region's public, non-profit and private partnerships could reduce barriers to, and increase opportunities for, greater housing production and affordability.

Targeted **state legislative changes** include:

Renewed Transit Oriented Development (TOD) Housing Program Funding (e.g. Proposition 1C)

Since its passage in 2006, the Transit Oriented Development (TOD) Housing Program, administered by the state department of Housing and Community Development, has helped

numerous transit-oriented districts (most within PDAs) attain economic viability, and helped further market acceptance of TOD. Because Proposition 1C, the funding source for this program, is due to expire, a new infusion of state funds is needed to advance planning for PDAs with strong transit access. Ideally, these new funds would be adjusted to make PDA location an explicit criteria—potentially coupled with demonstration of a commitment to the PDA in the form of local and regional investment in infrastructure and other initiatives (e.g. through distribution of OBAG funds and adoption of housing elements and specific plans supportive of the *Jobs Housing Connection* Scenario and RHNA).

Renewed Funding for the Multifamily Housing Program (MHP)

Another PDA-supportive tool that is set to be lost with the expiration of Proposition 1C funds is the Multifamily Housing Program (MHP), which is among the most important statewide permanent financing source for subsidized rental housing. Given the accelerating unmet demand for multifamily housing in the Bay Area, the MHP has particularly strong implications for implementing the Jobs-Housing Connection Strategy. The region can work with the state to identify a permanent source to replenish the MHP, potentially including criteria consistent with that proposed for a renewed TOD Housing Program. In addition, the program can be adjusted to complement new affordable housing construction with strategies such as acquiring and rehabilitating foreclosed units.

Align Low Income Housing Tax Credit (LIHTC) Qualified Allocation Plans with PDA Locations

The Qualified Allocation Plan (QAP) governs the criteria by which the California Tax Credit Allocation Committee (TCAC) competitively awards competitive, or 9%, Low Income Housing Tax Credits, to proposed subsidized rental affordable housing developments. While some of the criteria reward qualities present or planned for PDAs, a more explicit criterion for PDA and transit-accessible location in the QAP would help focus rental housing into these locations, bringing residents closer to services and amenities.

2.7: Pursue Federal Legislative Change Supporting Housing Availability and Choice

A federal legislative agenda supported by the region's public, non-profit and private partnerships can help remove obstacles to affordable housing, job growth, and infill development in the region, as

well as preparing PDAs to meet the region's long-term housing needs and spark economic development.

Targeted **federal changes** include:

Augment existing bond programs to prioritize investment in PDAs

Qualified energy conservation bonds, qualified redevelopment bonds, and smart grid investment green bonds can be increased by focusing these investments in PDAs—where they will be complemented by other major new infrastructure and programs. This approach would give communities a greater ability to customize, co-locate, and coordinate programs to meet their particular needs. A pilot project could be developed to prioritize PDAs for federal bonds to leverage local commitments and make more efficient use of federal funds.

Increase Low Income Housing Tax Credits (LIHTCs)

The Low Income Housing Tax Credit (LIHTC) is the most frequently used and significant program that subsidizes affordable rental housing in the United States and Bay Area. The LIHTC is embedded in the federal tax code and is therefore not subject to the federal government's annual appropriations process. Increasing the availability of these credits, coupled with changes in the state's allocation of the credits, would help focus housing investment into PDAs.

Change LIHTC Rules to Allow Charging for Parking

At present, the federal tax code does not allow parking construction costs to be included in the "eligible basis" used to calculate the amount of LIHTCs awarded to a subsidized rental project if a fee will be charged for the use of the parking facilities. This provision negatively impacts the financial viability of many subsidized rental housing projects, which are unable to include all of the costs of building parking garages, which can easily consume 20% of the construction budget for a development. This is particularly the case in infill locations such as PDAs in which structured or underground parking is necessary. Changing this part of the code to allow projects to charge for parking would help reduce this barrier to building much needed affordable rental housing in PDAs and other infill locations.

Increase Funding for Affordable Housing Production Programs (HOME, CDBG, Section 202, HOPWA)

Many affordable rental housing developments rely on funds from programs whose budgets are determined by the level of appropriations authorized by the federal government each year. While some of these programs received a temporary boost from the American Recovery and Reinvestment Act of 2009 (or ARRA, commonly known as "the stimulus bill"), on a long-term basis direct federal funding for affordable housing today is far below what it was several decades ago as a share of the US economy. A reversal in these trends would help to create more affordable rental housing in the Bay Area.

Reform Tax Regulations that Restrain Housing Production

One of the side effects of the Tax Reform Act (TRA) of 1986 was a dramatic reduction in the incentives embedded in the federal tax code for private investment in multifamily housing. While the LIHTC was included in the TRA in order to offset this change in incentives, it does so only partially, since LIHTCs can only be claimed on apartments rented at or below 60% of Area Median Income (AMI). A broader reform of the tax treatment of rental buildings would encourage more investment in unsubsidized Low and Moderate Income apartment building acquisition, rehabilitation, and construction.

The federal tax code also allows all homeowners to deduct mortgage interest for both primary and secondary residences. Changing this subsidy would steer investment from vacation homes to rental housing.

Potential Partnerships for Federal Legislative Change: ABAG, MTC, Legislators, Local Jurisdictions, Non-Profits

Action Area Three: Create Jobs to Maintain and Sustain and Maintain a Prosperous and Equitable Regional Economy

To support regional economic expansion and job creation, the region can focus on actions that address short-term challenges while also setting the stage for long term vitality. Actions focusing on specific sectors, incentives, and workforce issues can complement place-based efforts to create pathways to success and centers of innovation in PDAs. These actions include:

3.1: Identify and Support Industries of Opportunity

While the Bay Area's recovery from the recession has created significant new investment and profits for businesses, job growth still lags behind. The jobs that have been created are increasingly concentrated at the low and high end of the pay scale. Targeting investment and training on growing industries that offer middle income jobs is one way to improve the economic prospects of the region's communities. This will be a focus of the Regional Prosperity Plan led by a public/non-profit partnership and funded by the U.S. Department Housing and Urban Development (HUD).

Many of these industries will build upon the region's existing strengths and clusters of knowledge, while providing greater opportunity to low-income residents in the region's core. Some of these industries must be easily accessible to communities of concern in locations that are increasingly isolated from living wage job opportunities, such as Eastern Contra Costa and Solano Counties. In addition, the role of PDAs in structuring the region's future growth must be kept in focus as potential locations and networks of transportation access for these industries are developed. Once identified, industries of opportunity can be the basis for coordination between the region's educational institutions, industry groups, community organizations, and public agencies. Identifying these industries can be linked to actions involving pathways to success and focused job training as well as efforts to spark innovation.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, Non-Profits, Workforce Investment Boards, HUD, Relevant State Agencies, Community Colleges, Universities
Progress: Funded and Planned

3.2: Align Workforce Investment, Training, and Community Economic Development with Industries of Opportunity

To complement the region's focus on identifying Industries of Opportunity, regional agencies can work with the region's Workforce Investment Boards, community colleges, non-profits, and other

entities that provide technical training to align these programs with the skills needs of key industries. In addition, local and non-profit agencies that assist small business formation can be involved in this coordination. This effort to align objectives can also involve industry partners that make commitments to link trainees to career-ladder positions.

Potential Partnerships: Local Jurisdictions, Workforce Investment Boards, Community Colleges, Universities, Non-Profits, ABAG

3.3: Establish a Bay Area Centers of Innovation Initiative

The Bay Area has a wealth of research institutions, a vibrant venture capital community, talented workforce, and a variety of existing and planned public investments, but these are often physically separated. Many PDAs are ideal locations for bringing together these resources for mutual benefit, in particular Regional, City, and Transit Town Centers. While some centers are already places of exchange and innovation, others have an unrealized potential to become focal points for sectors that lack an attractive urban "place" in which to converge. Through investment in community infrastructure, quality urban design and the convergence of knowledge, the region's centers can become places that stimulate

Downtown Dublin Specific Plan

The core of a small community until the 1980s, Downtown Dublin has grown into a largely auto-oriented district providing retail and services for surrounding communities. The opening of the West Dublin Station BART station in 2006 adjacent to Downtown provided an impetus for re-imagining the area. Adopted in 2011, the Downtown Dublin Specific Plan calls for a dynamic commercial and mixed use center that acts as both a local anchor and regional destination for commercial development as well as shopping and entertainment. This vision is supported by zoning, urban design, and circulation adjustments, and a plan for required new infrastructure in what is a largely built out area. To account for the benefits of the proposed development pattern for pedestrians, bicyclists, and the environment, the plan includes a guiding principle to accept increased traffic congestion in downtown—an important compromise needed to relieve projects from the traffic impact analysis that often delays or halts infill development.

Designated a Suburban Center PDA, Downtown Dublin will be instrumental in focusing the new jobs and housing projected for the city into a walkable, easily accessible environment.



new ideas and draw connections between people, industries, and investments that currently have infrequent contact.

The region can begin to achieve this potential through an initiative to create a network of Centers of Innovation located within PDAs. These centers will combine a focus on creating the elements of complete community—pedestrian-friendly streets, access to daily conveniences, attractive gathering spaces–with an effort to spur innovation and job creation in a particular sector (e.g. energy, digital media, etc). Depending upon the scale of the center and community aspirations, this will involve partnerships between universities, industry groups, employers, and city and regional agencies. In addition to attracting investment and talent related to specific sectors, centers will host pilot projects for new ideas and technologies that will be integrated into streets, buildings, and homes, creating training and employment opportunities to local residents and students. Centers will be coordinated by a research and business development team that facilitates knowledge sharing, tracks the success of pilot projects, and helps promising businesses "scale up" their operations in a location within the center or elsewhere in the Bay Area (in turn capturing jobs that might otherwise be created outside the region).

The specific mechanisms by which the centers would attract investment and tenants (e.g. tax incentives, etc) would need to be developed through partnerships created for each center involving research institutions, industry groups, regional agencies, and local jurisdictions.

Potential Partnerships: Local Jurisdictions, ABAG, Universities and Research Institutions, Workforce Investment Boards, Non-Profits

3.4: Inventory and Prioritize Industrial Land

To help ensure an adequate supply of land to support long-term economic vitality and facilitate the growth of industries of the future, the region can create an inventory of the region's industrial land and prioritize areas that are home to thriving industries and/or provide capacity for accommodating emerging industries. As parts of the region transition from manufacturing and wholesaling activities to a more diverse industrial base that includes a greater proportion of Production, Distribution, and Repair (PDR) companies engaged in smaller scale activities, strategies for making land and space more flexible for users with a variety of needs will be needed. This initiative would be linked to the "industries of opportunity" and efforts to help firms "start up and scale up" within the Bay Area, and would require significant coordination between regional agencies, cities, and industry. This

effort would also include a strategy for retaining space focused on the needs of targeted industries, maintaining affordable leases, facilitating adaptation over time, and concentrating activity in locations with access to communities of concern, knowledge and infrastructure networks, and goods movement corridors.

To assist jurisdictions with limited resources, ABAG can develop replicable zoning strategies for industrial land that facilitate adaptation to sectoral shifts and changing spatial and user needs.
Potential Partnerships: Local Jurisdictions, ABAG, MTC, Non-Profits

3.5 Create an Economic Development Strategy Addressing the Needs of Distressed Suburban Communities

The impacts of the recession and foreclosure crisis had disproportionately negative impacts on many communities at the edge of the region. During the past decade, the desire for home ownership, safer neighborhoods and better schools helped fuel an outward migration of low and moderate income households and communities from the region's core to our suburban communities. In the wake of the recession, many of these communities face unique challenges that traditional local economic development strategies were not designed to address. Limited services, lack of affordable access to job opportunities, high foreclosure rates, and sustained unemployment have made many households vulnerable to long-term poverty. In many cases, this situation is exacerbated by local budget challenges.

Because no relevant "best practices" are readily available, and the networks of social services and affordable transportation necessary to address the new challenges are not in place, a focused effort by regional and local partners that begins to address these unique conditions can be initiated. This effort would identify the specific industries of opportunity for different parts of outlying communities, including opportunities to leverage unique community assets, identify crucial infrastructure and service improvements, and build capacity for implementation. This effort can be integrated into, and/or aligned with, the Regional Prosperity Plan, and can include implementation of pilot programs into suburban PDAs.
Potential Partnerships: Local Jurisdictions, ABAG, Non-Profits

3.6: Pursue Federal Legislative Change Supporting Economic Development

Several changes to federal legislation, pursued by the Bay Area's elected officials and a public, non-profit and private partnership can help expand economic development opportunities in the region—particularly for low-income residents and small businesses.

Targeted **federal legislative changes** supporting economic development include:

Expand Earned Income Tax Credit (EITC)

The Earned Income Tax Credit, targeted to low-income households, is widely credited for reducing poverty. Expanding its depth and reach will put more buying power into the hands of low-income households, thus making it easier for them to meet basic needs, including housing, on what they earn from low-paying jobs.

Expand CRA to Cover Business Loans

The Community Reinvestment Act (CRA) is federal legislation which ensures that banks do not unduly deprive households living in historically redlined neighborhoods, many of which coincide with the Bay Area's PDAs, from access to credit. The CRA already allows banks to use lending to small businesses in disadvantaged areas to count towards their obligation, but the program is underutilized. An initiative to increase awareness of this option and connect lenders with entrepreneurs could help many small businesses start up and grow.

Support Entrepreneurship via Schedule C Preparation Assistance

Small businesses, particularly micro-businesses and self-employed contractors, are often unaware of the multiple tax benefits available to them. One opportunity to provide technical assistance and boost entrepreneurial capacity is via Schedule C preparation, and several pilot programs have successfully helped businesses expand through interventions that start at tax time. The strength of this approach is its scalability: nationally, two million entrepreneurs file a Schedule C for the first time each year.

Increase New Market and Historic Preservation Tax Credits

Low Income Housing Tax Credits (LIHTCs) are not the only element in the federal tax code that helps cities and counties address local priorities. New Markets and Historic Preservation Tax Credits are well-established incentives that encourage project sponsors to pursue commercial developments in disinvested neighborhoods, and rehabilitate or adaptively reuse

historically designated properties, respectively. Because many PDAs have experienced long periods of disinvestment, and because many have a rich inventory of historic properties in need of reinvestment, an expansion of these two tax credit programs would strengthen the inflow of capital into these areas.

Augment Existing Grant and Loan Programs (CDBG Section 108 loan guarantees, Economic Development Initiative Grants, Neighborhood Initiative Grants)

Cities and counties rely heavily on federal grant and loan programs to build infrastructure, steer investment towards designated areas, ameliorate social conditions, and to undertake other locally important priorities. By augmenting these programs, cities would have a greater ability to ensure that local conditions are favorable for commercial and housing investment within the PDAs inside their boundaries in ways tailored to match their locally specified priorities.

Potential Partnerships for Federal Legislative Change: ABAG, MTC, Bay Area Legislators, Local Jurisdictions, Non-Profit Partnerships

Action Area Four: Create a Network of Complete Communities

Completing the comprehensive planning and funding actions in Action Area One will clear many of the barriers to creating complete communities in the region's jurisdictions. Other elements of complete communities—such as public spaces, quality schools, and improved public health—can be addressed by a complementary set of actions. Focused public investment in PDAs creates an opportunity to stimulate private development while increasing opportunities for low-income residents and reinforcing the unique qualities of the region's diverse communities. Achieving this objective will require a coordinated effort that couples incentives for new development with actions that preserve community assets, improve the quality of public services available to low-income residents, and reduce the risk of displacement. These actions include:

4.1: Incorporate Community Vitality Policies into PDA Planning

Ensuring that community investments reinforce and enhance the vitality of existing communities is a crucial challenge in the successful implementation of a PDA-focused growth strategy. Policies that reduce displacement risk can be coupled with efforts to support the social and cultural networks critical to community wellbeing. These can include: ensuring an inclusive engagement process

incorporating an evaluation of key community assets; preserving the scale and character of thriving commercial corridors that serve unique community needs; and directing resources to organizations and cultural and formal and informal spaces that help bring communities together. The region can build upon its previous work assessing the challenges and opportunities of Transit Oriented Development in communities of concern by creating guidelines to help guide PDA planning and strengthen incentives already included in PDA planning grant program and other funding sources that prioritize PDAs.

Potential Partnerships: Local Jurisdictions, ABAG, Non-Profits

4.2. Shift Parking Policies in PDAs to Support Infill

Parking costs can undermine the financial viability of development projects, particularly for infill projects that require structured or underground parking (which can cost as much as $40,000 per space). In PDAs with convenient transit access, minimum parking standards can create more parking than is needed while significantly increasing the cost to homeowners and renters.

Potential Partnerships for State Legislative Change: ABAG, MTC, State Legislators, Local Jurisdictions, Non-Profits

4.3: Create a PDA-focused Initiative to Improve Educational Performance

Schools in PDAs currently have a disproportionate number of students living in poverty and learning English as a second language, and often lack the resources to address the unique challenges facing these students outside the classroom. While many schools targeted for educational reform are in PDAs, jurisdictions and the region lack a coordinated strategy to link educational investment with investments in parks, transit, wrap-around social services, and economic development. Given that families' locational choices are linked in part to school quality, addressing school quality in PDAs, which are expected to take the bulk of housing growth, will be of primary importance to ensure the success of the Sustainable Communities Strategy.

Regional agencies can work with local jurisdictions, the state, the region's school districts, and economic development groups to create *pathways to success* for residents of PDAs—focusing first on communities of concern. This would involve aligning preschool, K-12, adult learning, school-based social services, and training to the unique needs of communities and expanding industries offering career-ladder jobs. This approach would be coupled with focused investment in the neighborhood infrastructure such as safe routes to school, complete streets, parks, and community centers. ABAG

can facilitate dialogue and implementation between jurisdictions, school districts, and other stakeholders, and potentially administer a competitive pilot program.

Potential Partnerships: School Districts, ABAG, Non-Profits, Workforce Investment Boards, Universities and Research Institutions

4.4: Improve School Accessibility

Many children do not attend their nearest local school, and even those that do often cannot conveniently walk, bicycle, or take transit to school. Developing and improving multi-modal transportation options to and from schools located within or near PDAs can help increase the range of school options available to families. Improving bicycling and walking accessibility to schools can also help to improve the public health of children.

Regional agencies, in coordination with local jurisdictions, transit agencies, school districts and public health department, can help to support transit, walking and bicycle accessibility in a number of ways, including: continued funding for accessibility improvements in PDAs through the OBAG grant and Safe Routes to Schools programs, support for transit-school schedule coordination, reduced price or free student transit passes, and development of local carpool and rideshare programs for parents.

Potential Partnerships: Local Jurisdictions, ABAG, MTC, School Districts

4.5: Implement Joint Use Agreements

The resources available on school campuses and adjacent public facilities are often underutilized, leading to gaps in services or duplication of services. Agreements between school districts and other public (often a city) or private entity addressing the joint use of facilities (e.g. libraries, gymnasiums), land, and utilities are in place in many locations throughout the region, and have significantly increased access to important amenities in many communities. These agreements are particularly important to creating complete communities in PDAs with limited resources. To help facilitate joint use agreements, regional agencies can distribute language developed by non-profit organizations with experience negotiating these agreements in Bay Area communities.

Potential Partnerships: School Districts, Park Districts, Local Jurisdictions, Non-Profits, ABAG

North San Jose Area Development Policy

North San Jose, one of the region's four Regional Centers, has one of the Bay Area's strongest concentrations of office parks and is home to a number of industry-leading tech companies. As the preferences of employees and major firms shifts toward mixed-use environments with strong transit access, the City of San Jose has begun to re-envision North San Jose as a series of complete communities. Transforming an environment designed for convenient automobile travel and single-use office buildings is a unique challenge that has rarely been successfully addressed.

Adopted in 2010, the North San Jose Development Policy builds upon the area's six Light Rail stations and strong demand for multi-family housing by providing guidelines for the re-use of existing properties and the development of new properties that emphasize pedestrian comfort, provision of public services such as parks and schools, and the integration of local-serving amenities throughout the district. As the region recovers from the recession, North San Jose has seen numerous new multi-family housing projects, marking the first steps toward making the district a complete community with a range of jobs and housing opportunities.



4.6: Increase Park funding for PDAs (e.g. Proposition 84)

Ensuring that all Bay Area residents can access public open spaces requires sufficient local, state, and federal funding for the acquisition of new urban parks, the renovation and management of existing urban parks, and for park stewardship and programming. A bond measure passed by the state's voters in 2006, Proposition 84, authorized roughly $5.4 billion in funding for a list of priorities that

includes state and local parks. More such funding will be needed to help Bay Area cities keep up with the demand for open space within PDAs as they absorb a growing share of the region's jobs and housing. Expanded funding or new legislation supporting new funding could prioritize acquisition of new parks and park maintenance within underserved PDAs with a high percentage of children. Regional agencies will continue to work with the State's Strategic Growth Council to secure additional funding for parks. Another funding option would be to collect an open space fee from large market-rate developments within PDAs, or PDAs with limited parkland.
Potential Partnerships: Park Districts, Local Jurisdictions, ABAG, MTC, Legislators

4.7: Integrate Community Health into PDA Planning

Growing awareness of the impact of the built environment on public health has led a number of Bay Area cities to integrate health into General, Specific, and other plans. Increased collaboration between departments of public health and planning departments can help make the design of communities more supportive of positive health outcomes while reducing duplication and inefficiency. Local jurisdictions can draw upon the successful experience of other communities and researchers to develop community health elements for general plans and to evaluate the health impacts of programs and policies. Regional agencies, non-profits, and health departments from jurisdictions that have woven health into planning processes can work with other jurisdictions to create health policies as a component of planning documents. Depending upon the community, these documents could emphasize issues such as the provision of locally-tailored health services, access to healthy foods, and expanding passive and active recreation opportunities.
Potential Partnerships: Local Jurisdictions, Health Districts, ABAG, Non-Profits

4.8: Coordinate Regional and Community Disaster Preparedness

At the core of disaster recovery are the social and physical assets of individual communities. The region can work with local jurisdictions to connect communities to critical regional information and resources, and to strengthen community-level preparedness. This could include establishing a "neighborhood support center" in a centrally located community gathering place, such as a community center, to hold meetings, exercises, and other awareness raising activities, as well as provide updated data and information. After a disaster, hubs can become sources for the distribution of goods, data centers, and touch points for community members. These hubs should

be easily accessible by foot and emergency transit, especially in lower density and transit dependent communities.

Potential Partnerships: Local Jurisdictions, ABAG, Relevant State and Federal Agencies

4.9: Integrate Sea Level Rise into Land Use and Transportation Planning

Sea level rise is a likely consequence of climate change. This requires advance planning and infrastructure to protect areas around the Bay. The Joint Policy Committee (JPC) has accepted this challenge and is scoping a strategy to address it. Where vulnerabilities are identified, the JPC will work to integrate adaptation and mitigation actions into specific plans, zoning, and other relevant planning policy.

Potential Partnerships: Regional Agencies, Other Special Districts

4.10: Address the Potential Air Quality Impacts of Infill Development

In concert with ABAG and MTC efforts to address mobile source GHG emissions, the Bay Area Air Quality Management District (BAAQMD) has identified regional solutions to both mobile and stationary source emissions while also developing strategies for reducing the impacts of pollutants on public health. At the regional scale, focused growth coordinated with transit investments improves air quality and GHG emissions. At the community scale, infill development has the potential to create air quality impacts. Addressing this challenge will require ongoing coordination between ABAG, MTC, local jurisdictions and BAAQMD to identify strategies that balance the benefits of infill development with the imperative of protecting public health.

Potential Partnerships: Local Jurisdictions, BAAQMD ABAG, MTC

Action Area Five: Protect the Region's Natural Environment

Preserving the region's ecologically, culturally, and economically valuable network of conservation lands can be addressed through near-term actions that expand upon ongoing programs as well as initiatives that provide the foundation for achieving the Strategy's open space goal, while also supporting the concentration of investment and future growth in PDAs. These actions include:

5.1: Initiate Priority Conservation Areas (PCAs) Pilot Program

The PCA Pilot Program included in the One Bay Area Grant provides an opportunity to accelerate the protection of key natural lands. The program will initially provide $5 million to fund purchase of PCAs and conservation in North Bay Counties. Successful pilots can provide the basis for similar efforts elsewhere in the region and build momentum for protecting additional PCAs in the North Bay. Regional Agencies, local jurisdictions, and conservation organizations can begin immediately to identify partnerships to acquire and dedicate PCAs that begin to identify natural, agricultural, and open space assets for protection.

Potential Partnerships: Local Jurisdictions, Non-Profits, ABAG
Progress: Funded and Planned

5.2: Identify Resources to Preserve the Conservation Lands Network (CLN)

The Conservation Lands Network is a group of interconnected habitats critical to preserving the region's natural resources and unique environmental qualities identified by a collaborative group of 125 scientists and resource managers. The CLN includes many PCAs, as well as other valuable lands throughout the region. Portions of the CLN are already protected by federal, state, and local regional policies or land trusts. For areas that are not yet protected, regional, state, and federal funds are needed to ensure long-term preservation. While urban growth boundaries and other policy mechanisms used by jurisdictions can help secure the network, long-term protection will require greater funding than is currently available. Regional agencies can help advance this process by brining together interested parties, including the federal and state government, together to identify a clear strategy for obtaining the substantial amount of funding needed to secure the CLN.

Potential Partnerships: Local Jurisdictions, ABAG, Non-Profits

5.3: Complete the Region's Four Major Multi-use Trails (Coastal Trail, San Francisco Bay Trail, Bay Area Ridge **Trail**, and Bay Area Water Trail)

The Bay Area's history of conservation and the popularity of outdoor recreation in the region have shaped planning for a trail network linking an array of natural habitats, landscapes, and communities. Significant progress has been made toward completing the region's three major multi-use trails—the region's portion of the Coastal Trail, the Bay Trail, and the Ridge Trail— and completing the planning for the Bay Area Water Trail, but additional funding and continued coordination between jurisdictions, the region's park districts, landowners and state and federal agencies is needed. ABAG currently leads the Bay Trail effort, providing grants for trail planning and construction in partnership with the San Francisco Bay Area Conservancy Program at the State Coastal Conservancy. The State Coastal Conservancy is also charged with implementing the Coastal Trail, Ridge Trail, and Water Trail and works with several partners, including ABAG, to plan and complete these trails. Regional agencies should facilitate an effort to identify planning and funding gaps that need to be addressed in order to complete the trails and help strengthen and solidify new partnerships to fill these gaps. This effort should also explore mechanisms for incorporating the completion of trail segments into permitting for development and infrastructure projects.

Potential Partnerships: Local Jurisdictions, ABAG, Special Districts, Non-Profits
Progress: Trails planned and partially completed

5.4.: Extend the Expiration Dates of Existing Urban Growth Boundaries and Other Conservation Lands Policy Protections

While many jurisdictions have mechanisms in place to protect open space, many of these protections are not permanent and over time can become vulnerable to development. To support implementation of the *Jobs Housing Connection* Scenario, regional agencies can work with jurisdictions to extend the expiration dates of existing policy protections. Where appropriate, this can include providing technical assistance for putting in place mechanisms such as agricultural zoning and other longer-term policy protections. This action can be coordinated with the dedication of PCAs and other conservation lands throughout the region.

Potential Partnerships: Local Jurisdictions, Special Districts, ABAG

5.5: Develop a Regional Agricultural and Farmland Protection Plan

The Bay Area's agricultural sector is a defining feature that not only provides a ready source of fresh food, but also represents one of the region's economic drivers—supporting successful farms and

wineries and drawing tourists from around the world. Agriculture helps shape the region's communities by extending open space corridors and providing an edge to many cities and neighborhoods. In the face of a regional trend toward urbanization of farmland, the Bay Area can reinforce the strategic importance of the sector in the region's economy and in implementing the Jobs-Housing Connection Strategy by developing an Agricultural and Farmland Protection Plan. This would involve drawing upon existing partnerships to identify challenges and opportunities to securing the sector's future, and working with local jurisdictions to develop land use, economic development, and infrastructure policies, drawing upon the experience of cities throughout the region. In addition to employing proven strategies, cities can explore innovative approaches to support the creation of markets for the region's farms, such as zoning for non-traditional retail uses such as farm stands, farmers markets, and mobile markets, and to facilitate the expansion of small-scale and urban agriculture.

Potential Partnerships: Relevant State Agencies, Special Districts, Local Jurisdictions, Non-Profits, ABAG

5. Next Steps

This Jobs-Housing Connection Strategy builds upon emerging economic and housing development trends to propose a growth pattern focused on core urban areas. Among these is the need of knowledge-based businesses, a growing senior population and young professionals to be in close proximity to services and amenities. A focused pattern of future growth that responds to this trend brings opportunities and challenges. It reduces the development pressures on open space and agricultural land, makes an efficient use of infrastructure and reduces driving, but also heightens the importance of overcoming longstanding obstacles to housing production in infill sites.

The Strategy's growth pattern reflects broad community support for walkable communities that offer an array of housing options in close proximity to frequent transit. The Priority Development Areas nominated by jurisdictions across the region are focal points for future housing and jobs, accommodating well over two-thirds of both over the next 30 years. PDAs are the places where the Strategy will become reality. The Strategy introduces a set of implementation actions that address the region's core economic, environmental, and equity challenges with the overarching objective of making PDAs communities of opportunity, diversity, and growth.

As the region moves toward a more focused growth pattern, coordinating planning between regional agencies and local jurisdictions becomes increasingly important. This Strategy supports this objective by integrating regional transportation and land use planning while identifying opportunities to coordinate with regional efforts addressing air quality, sea level rise, and resilience to natural disasters. In the next SCS, all of these elements of regional planning will be further integrated.

Because the SCS will be updated every four years, the implementation actions included in the strategy prioritize immediate support for infill development and affordable housing, as well as near-term initiatives that set the stage for expanded economic opportunities, sustained preservation of open space, and creating healthy communities. A number of implementation actions are already in motion, but much discussion is required to define the priorities that would achieve the region to meet the Strategy's proposed goals. This discussion will continue during the second half of 2012 and early 2013, moving toward adoption of the SCS and implementation.

Immediate next steps for advancing the Jobs-Housing Connection Strategy include:

- Dialogue among regional agencies, local jurisdictions and stakeholders
- Refinement of implementation priorities and agenda
- Coordination with the HUD-funded Regional Prosperity Plan led by regional agencies
- Development of PDA growth strategies by county Congestion Management Agencies (CMAs)
- Approval of Sustainable Communities Strategy in April 2013

Appendices

Appendix A: Growth Forecast by Jurisdiction

Appendix B: Housing and Employment Methodology

Appendix C: Maps: Priority Development Areas by County

Appendix D: Additional Conditions that Could Impact the U.S. Housing Market

Appendix E: Resources

Appendix F: Glossary of Terms

Appendix A: Growth Forecast by Jurisdiction

Employment Growth by PDA and Jurisdiction

KEY
Jurisdiction (Bold Italic)
Priority Development Area
PDA Pending Designation

Alameda County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Alameda		***24,030***	***33,180***	***9,150***	***38%***
Naval Air Station	Transit Town Center	1,220	8,420	7,200	
Northern Waterfront	Transit Neighborhood	2,430	3,430	1,000	
Albany		***4,210***	***5,610***	***1,400***	***33%***
San Pablo Avenue & Solano Avenue	Mixed-Use Corridor	1,910	2,430	520	
Berkeley		***77,020***	***99,220***	***22,210***	***29%***
Adeline Street	Mixed-Use Corridor	950	1,620	680	
Downtown	City Center	15,200	21,590	6,380	
San Pablo Avenue	Mixed-Use Corridor	2,390	3,340	940	
South Shattuck	Mixed-Use Corridor	1,140	1,440	300	
Telegraph Avenue	Mixed-Use Corridor	1,730	2,560	820	
University Avenue	Mixed-Use Corridor	1,410	1,980	580	
Dublin		***16,760***	***29,300***	***12,540***	***75%***
Downtown Specific Plan Area	Suburban Center	4,440	8,340	3,900	
Town Center	Suburban Center	310	1,320	1,010	
Transit Center	Suburban Center	0	6,370	6,370	
Emeryville		***16,040***	***23,580***	***7,540***	***47%***
Mixed-Use Core	City Center	11,260	18,420	7,160	
Fremont		***89,900***	***119,870***	***29,970***	***33%***
Centerville	Transit Neighborhood	4,020	4,450	430	
City Center	City Center	18,750	24,640	5,890	
Irvington District	Transit Town Center	5,460	5,640	180	
South Fremont/Warm Springs	Suburban Center	12,880	28,970	16,090	
Hayward		***69,100***	***89,900***	***20,800***	***30%***
Downtown	City Center	7,350	10,590	3,240	
South Hayward BART	Mixed-Use Corridor	320	810	490	
South Hayward BART	Urban Neighborhood	470	1,630	1,160	
The Cannery	Transit Neighborhood	1,450	2,380	930	
Mission Corridor	Mixed-Use Corridor	1,690	2,840	1,150	
Livermore		***38,370***	***51,620***	***13,250***	***35%***
Downtown	Suburban Center	2,870	3,560	690	
East Side	*Suburban Center*	*16,360*	*24,440*	*8,080*	
Isabel Avenue/BART Station Planning Area	Suburban Center	3,290	7,100	3,810	
Newark		***17,870***	***23,090***	***5,210***	***29%***
Dumbarton Transit Oriented Develo	Transit Town Center	860	2,100	1,240	
Old Town Mixed Use Area	Transit Neighborhood	180	390	210	
Oakland		***190,250***	***275,490***	***85,240***	***45%***
Coliseum BART Station Area	Transit Town Center	5,150	12,420	7,270	
Downtown & Jack London Square	Regional Center	88,180	127,620	39,440	
Eastmont Town Center	Urban Neighborhood	3,450	5,310	1,860	
Fruitvale & Dimond Areas	Urban Neighborhood	8,130	15,670	7,540	
MacArthur Transit Village	Urban Neighborhood	10,580	12,860	2,280	
Transit Oriented Development Corridors	Mixed-Use Corridor	33,490	41,770	8,280	
West Oakland	Transit Town Center	7,430	14,890	7,470	
Piedmont		***1,930***	***2,410***	***480***	***25%***
Pleasanton		***54,230***	***69,520***	***15,300***	***28%***
Hacienda	Suburban Center	9,910	15,320	5,410	
San Leandro		***39,900***	***52,830***	***12,930***	***32%***
Bay Fair BART Transit Village	Transit Town Center	1,430	2,690	1,260	
Downtown Transit Oriented Development	City Center	2,790	2,840	50	
East 14th Street	Mixed-Use Corridor	9,000	15,670	6,670	
Union City		***20,560***	***25,650***	***5,100***	***25%***
Intermodal Station District	City Center	340	2,810	2,460	
Alameda County Unincorporated		***34,270***	***46,350***	***12,080***	***35%***
Castro Valley BART	Transit Neighborhood	2,020	2,970	950	
East 14th Street and Mission Street	Mixed-Use Corridor	2,730	4,240	1,500	
Hesperian Boulevard	Transit Neighborhood	1,860	2,590	740	
Meekland Avenue Corridor	Transit Neighborhood	900	1,330	430	

Employment Growth by PDA and Jurisdiction

Contra Costa County

		JOBS			
Jursidiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Antioch		***19,070***	***25,490***	***6,420***	***34%***
Hillcrest eBART Station	Suburban Center	20	3,260	3,240	
Rivertown Waterfront	Transit Town Center	4,030	4,520	490	
Brentwood		***8,650***	***11,280***	***2,620***	***30%***
Clayton		***1,540***	***1,940***	***400***	***26%***
Concord		***47,520***	***69,310***	***21,790***	***46%***
Community Reuse Area	Regional Center	170	14,180	14,020	
Community Reuse Area	Transit Neighborhood	0	3,240	3,240	
Downtown	City Center	7,840	10,190	2,350	
Danville		***13,440***	***17,600***	***4,160***	***31%***
Downtown Danville	Transit Town Center	5,320	7,280	1,960	
El Cerrito		***5,880***	***7,310***	***1,430***	***24%***
San Pablo Avenue Corridor	Mixed-Use Corridor	3,510	4,340	830	
Hercules		***3,880***	***6,400***	***2,520***	***65%***
Central Hercules	Transit Neighborhood	800	1,830	1,030	
Waterfront District	Transit Town Center	1,210	1,860	650	
Lafayette		***10,640***	***13,230***	***2,590***	***24%***
Downtown	Transit Town Center	5,960	7,520	1,560	
Martinez		***18,300***	***22,460***	***4,160***	***23%***
Downtown	Transit Neighborhood	4,040	5,110	1,070	
Moraga		***4,740***	***5,930***	***1,190***	***25%***
Moraga Center	Transit Town Center	1,140	1,400	260	
Oakley		***3,740***	***6,670***	***2,930***	***78%***
Downtown	Transit Town Center	800	1,390	580	
Employment Area	Suburban Center	680	2,290	1,610	
Potential Planning Area	Transit Neighborhood	290	880	590	
Orinda		***5,530***	***6,980***	***1,450***	***26%***
Downtown	Transit Town Center	3,220	3,980	750	
Pinole		***6,740***	***8,480***	***1,740***	***26%***
Appian Way Corridor	Suburban Center	2,430	3,190	750	
Old Town	Transit Town Center	2,830	3,440	610	
Pittsburg		***14,130***	***19,740***	***5,610***	***40%***
Downtown	Transit Neighborhood	1,390	2,500	1,110	
Railroad Avenue eBART Station	Transit Town Center	5,590	7,910	2,320	
Pleasant Hill		***17,360***	***22,920***	***5,560***	***32%***
Buskirk Avenue Corridor	Mixed-Use Corridor	4,580	6,190	1,610	
Diablo Valley College	Transit Neighborhood	2,550	4,190	1,640	
Richmond		***30,670***	***42,180***	***11,520***	***38%***
Central Richmond & 23rd Street Corridor	Mixed-Use Corridor	6,600	8,660	2,070	
South Richmond	Transit Neighborhood	6,990	9,320	2,330	
San Pablo		***7,460***	***9,650***	***2,190***	***29%***
San Pablo Avenue & 23rd Street	Mixed-Use Corridor	5,530	7,510	1,980	
Rumrill Boulevard	*Employment Center*	*220*	*320*	*100*	
San Ramon		***43,880***	***58,240***	***14,350***	***33%***
City Center	Suburban Center	10,400	17,760	7,370	
North Camino Ramon	Transit Town Center	11,410	14,440	3,020	
Walnut Creek		***41,650***	***57,300***	***15,650***	***38%***
West Downtown	Suburban Center	7,440	12,210	4,770	
Contra Costa County Unincorporated		***40,100***	***53,900***	***13,800***	***34%***
Contra Costa Centre	Mixed-Use Corridor	3,730	4,740	1,010	
Downtown El Sobrante	Mixed-Use Corridor	940	1,430	490	
North Richmond	Transit Neighborhood	1,480	1,980	500	
Pittsburg/Bay Point BART Station	Transit Neighborhood	530	2,590	2,060	
West Contra Costa Transportation Advisory Committee					
San Pablo Avenue Corridor	Mixed-Use Corridor	3,190	5,160	1,970	

Employment Growth by PDA and Jurisdiction

Marin County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Belvedere		***430***	***480***	***50***	***12%***
Corte Madera		***7,940***	***8,260***	***320***	***4%***
Fairfax		***1,490***	***1,820***	***330***	***22%***
Larkspur		***7,190***	***7,810***	***620***	***9%***
Mill Valley		***5,980***	***6,780***	***810***	***14%***
Novato		***20,890***	***24,390***	***3,490***	***17%***
Ross		***510***	***590***	***80***	***16%***
San Anselmo		***3,740***	***4,350***	***610***	***16%***
San Rafael		***37,620***	***44,960***	***7,340***	***20%***
Civic Center/North Rafael Town Center	Transit Town Center	5,660	6,860	1,200	
Downtown	City Center	8,250	10,480	2,230	
Sausalito		***6,220***	***7,630***	***1,420***	***23%***
Tiburon		***2,340***	***2,690***	***340***	***15%***
Marin County Unincorporated		***16,380***	***19,360***	***2,980***	***18%***
Urbanized 101 Corridor	Transit Neighborhood	2,260	2,960	700	

Napa County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
American Canyon		***2,920***	***4,160***	***1,240***	***42%***
Highway 29 Corridor	Mixed-Use Corridor	1,280	2,100	810	
Calistoga		***2,220***	***2,640***	***420***	***19%***
Napa		***33,950***	***44,520***	***10,570***	***31%***
Downtown Napa	*Rural Town Center*	*9,870*	*11,620*	*1,750*	
Soscol Gateway Corridor	*Rural Corridor*	*1,080*	*1,950*	*870*	
St. Helena		***5,340***	***6,230***	***890***	***17%***
Yountville		***1,600***	***1,980***	***380***	***24%***
Napa County Unincorporated		***24,630***	***30,000***	***5,380***	***22%***

San Francisco County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
San Francisco		***568,720***	***759,470***	***190,740***	***34%***
19th Avenue	Transit Town Center	9,980	13,570	3,580	
Balboa Park	Transit Neighborhood	2,690	3,460	770	
Bayview/Hunters Point Shipyard/Candlestick Point	Urban Neighborhood	19,590	29,260	9,660	
Downtown-Van Ness-Geary	Regional Center	315,570	368,140	52,580	
Eastern Neighborhoods	Urban Neighborhood	61,070	70,890	9,820	
Market & Octavia	Urban Neighborhood	31,850	34,790	2,940	
Mission Bay	Urban Neighborhood	2,770	27,200	24,430	
Mission-San Jose Corridor	Mixed-Use Corridor	12,680	18,760	6,080	
Port of San Francisco	Mixed-Use Corridor	5,430	24,400	18,970	
San Francisco/San Mateo Bi-County Area (with Brisbane)	Transit Neighborhood	1,720	2,580	860	
Transbay Terminal	Regional Center	7,950	37,660	29,710	
Treasure Island	Transit Town Center	260	3,010	2,750	

Employment Growth by PDA and Jurisdiction

San Mateo County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
Atherton		***2,610***	***3,170***	***560***	***21%***
Belmont		***8,220***	***10,500***	***2,280***	***28%***
Villages of Belmont	Mixed-Use Corridor	1,260	2,510	1,260	
Brisbane		***7,220***	***8,280***	***1,060***	***15%***
San Francisco/San Mateo Bi-County Area (with San Francisco)	Suburban Center	550	1,100	540	
Burlingame		***30,420***	***39,210***	***8,790***	***29%***
Burlingame El Camino Real	Transit Town Center	12,480	18,460	5,980	
Colma		***2,790***	***3,210***	***420***	***15%***
Daly City		***21,000***	***26,910***	***5,900***	***28%***
Bayshore	Transit Town Center	1,110	3,260	2,160	
Mission Boulevard	Mixed-Use Corridor	3,790	5,240	1,450	
East Palo Alto		***2,720***	***3,750***	***1,020***	***38%***
Ravenswood	Transit Town Center	810	1,230	430	
Foster City		***13,890***	***17,490***	***3,600***	***26%***
Half Moon Bay		***5,110***	***6,120***	***1,010***	***20%***
Hillsborough		***2,190***	***2,620***	***430***	***20%***
Menlo Park		***28,990***	***35,110***	***6,120***	***21%***
El Camino Real Corridor and Downtown	Transit Town Center	5,630	7,680	2,050	
Millbrae		***6,950***	***9,410***	***2,460***	***35%***
Transit Station Area	Mixed-Use Corridor	1,350	3,400	2,060	
Pacifica		***5,920***	***7,170***	***1,250***	***21%***
Portola Valley		***1,510***	***1,780***	***270***	***18%***
Redwood City		***58,340***	***77,830***	***19,490***	***33%***
Downtown	City Center	10,470	14,110	3,640	
BroadwayVeterans Boulevard Corridor	Mixed-Use Corridor	8,540	11,980	3,440	
San Bruno		***12,930***	***17,250***	***4,320***	***33%***
Transit Corridors	Mixed-Use Corridor	6,750	10,710	3,960	
San Carlos		***16,170***	***19,790***	***3,620***	***22%***
Railroad Corridor	Transit Town Center	1,950	3,110	1,160	
San Mateo		***52,930***	***73,460***	***20,530***	***39%***
Downtown	City Center	4,440	7,050	2,610	
El Camino Real	Mixed-Use Corridor	2,270	5,680	3,410	
Rail Corridor	Transit Neighborhood	8,840	18,700	9,870	
South San Francisco		***46,170***	***57,400***	***11,230***	***24%***
Downtown	Transit Town Center	2,670	6,920	4,250	
Woodside		***1,770***	***2,070***	***310***	***18%***
San Mateo County Unincorporated		***17,350***	***22,790***	***5,440***	***31%***
Midcoast	*Rural Corridor*	*1,890*	*2,670*	*780*	
City County Association of Governments of San Mateo County					
El Camino Real	Mixed-Use Corridor	9,530	13,180	3,670	

Employment Growth by PDA and Jurisdiction

Santa Clara County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Campbell		***27,230***	***35,050***	***7,820***	***29%***
Central Redevelopment Area	Transit Neighborhood	7,880	10,220	2,340	
Cupertino		***25,990***	***33,350***	***7,360***	***28%***
Gilroy		***17,600***	***21,900***	***4,300***	***24%***
Downtown	Transit Town Center	2,370	3,600	1,230	
Los Altos		***14,700***	***18,160***	***3,460***	***24%***
Los Altos Hills		***3,580***	***4,440***	***860***	***24%***
Los Gatos		***23,580***	***28,980***	***5,390***	***23%***
Milpitas		***45,060***	***57,640***	***12,580***	***28%***
Transit Area	Suburban Center	5,240	9,560	4,320	
Monte Sereno		***450***	***570***	***120***	***27%***
Morgan Hill		***17,520***	***22,080***	***4,560***	***26%***
Downtown	Transit Town Center	1,660	3,000	1,340	
Mountain View		***47,800***	***63,380***	***15,570***	***33%***
Downtown	Transit Town Center	9,410	10,250	850	
East Whisman	*Employment Center*	*8,710*	*12,380*	*3,670*	
El Camino Real Corridor	Mixed-Use Corridor	5,770	6,630	850	
North Bayshore	Suburban Center	7,390	15,070	7,690	
San Antonio Center	Transit Town Center	3,150	4,330	1,180	
Whisman Station	Transit Neighborhood	650	1,210	560	
Palo Alto		***89,370***	***119,030***	***29,650***	***33%***
California Avenue	Transit Neighborhood	3,370	5,030	1,660	
San Jose		***375,360***	***522,050***	***146,680***	***39%***
Bascom TOD Corridor	Mixed-Use Corridor	11,520	12,910	1,390	
Bascom Urban Village	Mixed-Use Corridor	1,700	2,660	960	
Berryessa Station	Transit Neighborhood	6,140	12,180	6,040	
Blossom Hill/Snell Urban Village	Mixed-Use Corridor	880	1,720	840	
Camden Urban Village	Mixed-Use Corridor	5,600	7,630	2,030	
Capitol Corridor Urban Villages	Mixed-Use Corridor	2,340	5,580	3,250	
Capitol/Tully/King Urban Villages	Suburban Center	4,070	7,060	2,990	
Communications Hill	Transit Town Center	3,940	5,650	1,710	
Cottle Transit Village	Suburban Center	2,550	3,040	490	
Downtown "Frame"	City Center	26,760	31,090	4,330	
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	9,950	13,380	3,430	
Greater Downtown	Regional Center	27,950	55,970	28,020	
International Business Park	*Employment Center*	*11,650*	*19,730*	*8,080*	
North San Jose	Regional Center	84,290	130,190	45,900	
Oakridge/Almaden Plaza Urban Village	Suburban Center	5,430	9,700	4,270	
Old Edenvale	*Employment Center*	*6,900*	*14,690*	*7,790*	
Saratoga TOD Corridor	Mixed-Use Corridor	3,520	5,520	2,000	
Stevens Creek TOD Corridor	Mixed-Use Corridor	5,680	8,020	2,340	
West San Carlos & Southwest Expressway Corridors	Mixed-Use Corridor	8,940	15,600	6,660	
Westgate/El Paseo Urban Village	Suburban Center	3,440	5,230	1,790	
Winchester Boulevard TOD Corridor	Mixed-Use Corridor	4,040	6,820	2,780	
Santa Clara		***112,460***	***145,560***	***33,100***	***29%***
El Camino Real Focus Area	Mixed-Use Corridor	4,390	6,980	2,590	
Santa Clara Station Focus Area	City Center	10,020	12,750	2,740	
Saratoga		***11,870***	***14,500***	***2,630***	***22%***
Sunnyvale		***74,610***	***95,320***	***20,710***	***28%***
Downtown & Caltrain Station	Transit Town Center	3,750	5,660	1,910	
East Sunnyvale	Urban Neighborhood	8,050	9,240	1,180	
El Camino Real Corridor	Mixed-Use Corridor	13,190	16,390	3,200	
Lawrence Station Transit Village	Transit Neighborhood	4,160	5,380	1,220	
Moffett Park	*Employment Center*	*11,420*	*18,890*	*7,470*	
Peery Park	*Employment Center*	*5,980*	*7,920*	*1,940*	
Reamwood Light Rail Station	*Employment Center*	*3,050*	*3,720*	*680*	
Tasman Station ITR	Mixed-Use Corridor	1,540	2,530	980	
Santa Clara County Unincorporated		***39,060***	***47,800***	***8,740***	***22%***
Valley Transportation Authority					
Cores, Corridors, and Station Areas	*Mixed-Use Corridor*	*90,770*	*118,380*	*27,610*	

Employment Growth by PDA and Jurisdiction

Solano County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Benicia		***14,240***	***18,920***	***4,680***	***33%***
Downtown	Transit Neighborhood	2,540	2,840	300	
Northern Gateway	*Employment Center*	6,780	10,930	4,150	
Dixon		***4,460***	***5,780***	***1,310***	***29%***
Downtown	*Rural Town Center*	*560*	*830*	*280*	
Fairfield		***39,300***	***53,310***	***14,000***	***36%***
Downtown South (Jefferson Street)	Suburban Center	2,970	4,280	1,320	
Fairfield-Vacaville Train Station	Transit Town Center	340	2,650	2,310	
North Texas Street Core	Mixed-Use Corridor	1,420	2,420	1,000	
West Texas Street Gateway	Mixed-Use Corridor	1,680	2,890	1,210	
Rio Vista		***1,790***	***2,340***	***550***	***31%***
Downtown	*Rural Town Center*	*670*	*1,000*	*330*	
Suisun City		***3,080***	***4,520***	***1,440***	***47%***
Downtown & Waterfront	Transit Town Center	1,040	1,960	920	
Vacaville		***29,800***	***41,120***	***11,310***	***38%***
Allison Area	Suburban Center	900	1,710	810	
Downtown	Transit Town Center	2,800	3,800	1,000	
Vallejo		***31,660***	***43,060***	***11,410***	***36%***
Waterfront & Downtown	Suburban Center	3,640	5,940	2,300	
Solano County Unincorporated		***8,010***	***10,860***	***2,850***	***36%***

Sonoma County

		JOBS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**
Cloverdale		***1,570***	***2,270***	***700***	***45%***
Downtown/SMART Transit Area	Transit Town Center	880	1,390	510	
Cotati		***2,920***	***3,860***	***940***	***32%***
Downtown and Cotati Depot	Transit Town Center	650	1,190	550	
Healdsburg		***6,440***	***8,210***	***1,780***	***28%***
Petaluma		***28,830***	***38,690***	***9,860***	***34%***
Central, Turning Basin/Lower Reach	Suburban Center	3,110	8,330	5,220	
Rohnert Park		***11,730***	***16,320***	***4,590***	***39%***
Central Rohnert Park	Transit Town Center	3,350	5,170	1,820	
Sonoma Mountain Village	Suburban Center	140	1,190	1,050	
Santa Rosa		***75,460***	***103,930***	***28,470***	***38%***
Downtown Station Area	City Center	9,250	13,800	4,550	
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	23,230	30,080	6,850	
North Santa Rosa Station	Suburban Center	8,960	13,060	4,090	
Roseland	Transit Neighborhood	2,650	3,890	1,240	
Sebastopol Road Corridor	Mixed-Use Corridor	2,110	3,450	1,340	
Sebastopol		***5,650***	***7,300***	***1,650***	***29%***
Nexus Area	*Rural Town Center*	5,440	7,010	1,570	
Sonoma		***6,650***	***8,640***	***1,990***	***30%***
Windsor		***5,610***	***7,760***	***2,150***	***38%***
Redevelopment Area	Suburban Center	1,020	1,830	810	
Sonoma County Unincorporated		***47,150***	***60,470***	***13,320***	***28%***
Forestville	*Rural Town Center*	*540*	*590*	*50*	
Graton	*Rural Town Center*	*410*	*720*	*320*	
Guerneville	*Rural Town Center*	*640*	*980*	*340*	
Penngrove Urban Service Area	*Rural Town Center*	*340*	*610*	*260*	
The Springs	*Rural Corridor*	*2,100*	*2,580*	*480*	

Household Growth by PDA and Jurisdiction

KEY
Jurisdiction (Bold Italic)
Priority Development Area
PDA Pending Designation

Alameda County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Alameda		***32,350***	***38,240***	***5,890***	***18%***	***30,120***	***36,570***	***6,440***	***21%***
Naval Air Station	Transit Town Center	1,460	5,470	4,010		1,090	5,040	3,950	
Northern Waterfront	Transit Neighborhood	1,070	1,830	760		990	1,760	780	
Albany		***7,890***	***9,060***	***1,170***	***15%***	***7,400***	***8,740***	***1,340***	***18%***
San Pablo Avenue & Solano Avenue	Mixed-Use Corridor	1,810	2,060	240		1,690	1,970	280	
Berkeley		***49,450***	***58,730***	***9,280***	***19%***	***46,030***	***55,980***	***9,950***	***22%***
Adeline Street	Mixed-Use Corridor	690	940	250		620	900	280	
Downtown	City Center	2,690	6,840	4,150		2,570	6,670	4,100	
San Pablo Avenue	Mixed-Use Corridor	1,630	2,500	870		1,440	2,340	900	
South Shattuck	Mixed-Use Corridor	340	460	110		310	440	120	
Telegraph Avenue	Mixed-Use Corridor	1,110	1,470	360		990	1,400	410	
University Avenue	Mixed-Use Corridor	1,660	2,310	650		1,560	2,220	660	
Dublin		***15,780***	***24,320***	***8,530***	***54%***	***14,910***	***23,610***	***8,700***	***58%***
Downtown Specific Plan Area	Suburban Center	830	1,790	960		790	1,750	950	
Town Center	Suburban Center	4,130	5,990	1,860		3,750	5,770	2,020	
Transit Center	Suburban Center	670	3,810	3,130		620	3,720	3,100	
Emeryville		***6,650***	***12,110***	***5,470***	***82%***	***5,690***	***11,620***	***5,920***	***104%***
Mixed-Use Core	City Center	4,150	9,620	5,470		3,530	9,300	5,770	
Fremont		***73,990***	***91,610***	***17,620***	***24%***	***71,000***	***89,080***	***18,080***	***25%***
Centerville	Transit Neighborhood	10,850	13,360	2,510		10,360	12,980	2,620	
City Center	City Center	7,310	10,210	2,900		6,870	9,910	3,040	
Irvington District	Transit Town Center	7,280	10,260	2,980		6,910	9,990	3,080	
South Fremont/Warm Springs	Suburban Center	2,330	5,310	2,980		2,180	5,150	2,970	
Hayward		***48,300***	***60,580***	***12,290***	***25%***	***45,370***	***58,820***	***13,460***	***30%***
Downtown	City Center	2,290	5,510	3,220		2,100	5,370	3,280	
South Hayward BART	Mixed-Use Corridor	180	1,360	1,170		170	1,330	1,160	
South Hayward BART	Urban Neighborhood	1,800	4,490	2,700		1,660	4,400	2,740	
The Cannery	Transit Neighborhood	340	1,090	750		330	1,070	740	
Mission Corridor	Mixed-Use Corridor	1,480	3,320	1,840		1,230	3,210	1,980	
Livermore		***30,340***	***40,020***	***9,670***	***32%***	***29,130***	***38,920***	***9,780***	***34%***
Downtown	Suburban Center	1,020	2,690	1,680		920	2,620	1,710	
East Side	Suburban Center	100	4,370	4,270		90	4,280	4,190	
Isabel Avenue/BART Station Planning Area	Suburban Center	530	4,000	3,470		470	3,910	3,440	
Newark		***13,410***	***17,090***	***3,670***	***27%***	***12,970***	***16,630***	***3,660***	***28%***
Dumbarton Transit Oriented Develop	Transit Town Center	140	2,540	2,400		140	2,500	2,360	
Old Town Mixed Use Area	Transit Neighborhood	600	970	370		580	940	370	
Oakland		***169,710***	***221,200***	***51,490***	***30%***	***153,790***	***212,500***	***58,710***	***38%***
Coliseum BART Station Area	Transit Town Center	3,870	10,720	6,850		3,440	10,420	6,980	
Downtown & Jack London Square	Regional Center	11,910	26,190	14,290		10,630	25,390	14,760	
Eastmont Town Center	Urban Neighborhood	6,850	7,260	410		5,960	6,840	880	
Fruitvale & Dimond Areas	Urban Neighborhood	14,210	18,580	4,370		12,840	17,820	4,990	
MacArthur Transit Village	Urban Neighborhood	8,820	13,910	5,090		8,030	13,410	5,380	
Transit Oriented Development Corridors	Mixed-Use Corridor	67,370	77,570	10,200		60,970	74,390	13,410	
West Oakland	Transit Town Center	10,830	17,690	6,870		9,030	16,940	7,910	
Piedmont		***3,920***	***4,020***	***90***	***2%***	***3,800***	***3,890***	***90***	***2%***
Pleasanton		***26,050***	***33,200***	***7,150***	***27%***	***25,250***	***32,330***	***7,090***	***28%***
Hacienda	Suburban Center	1,310	4,900	3,590		1,270	4,800	3,530	
San Leandro		***32,420***	***39,630***	***7,210***	***22%***	***30,720***	***38,390***	***7,670***	***25%***
Bay Fair BART Transit Village	Transit Town Center	660	1,560	900		630	1,520	890	
Downtown Transit Oriented Development	City Center	4,210	7,900	3,690		3,930	7,690	3,760	
East 14th Street	Mixed-Use Corridor	4,920	6,240	1,310		4,490	5,980	1,480	
Union City		***21,260***	***24,270***	***3,010***	***14%***	***20,430***	***23,650***	***3,220***	***16%***
Intermodal Station District	City Center	1,060	1,850	800		1,030	1,810	780	
Alameda County Unincorporated		***51,020***	***56,450***	***5,430***	***11%***	***48,520***	***54,570***	***6,050***	***12%***
Castro Valley BART	Transit Neighborhood	1,480	2,150	670		1,400	2,090	690	
East 14th Street and Mission Street	Mixed-Use Corridor	7,190	9,120	1,930		6,740	8,800	2,060	
Hesperian Boulevard	Transit Neighborhood	2,860	3,560	690		2,740	3,450	720	
Meekland Avenue Corridor	Transit Neighborhood	1,400	1,860	460		1,300	1,790	500	

Household Growth by PDA and Jurisdiction

Contra Costa County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Antioch		***34,850***	***40,320***	***5,470***	***16%***	***32,250***	***38,780***	***6,530***	***20%***
Hillcrest eBART Station	Suburban Center	160	2,450	2,290		150	2,400	2,250	
Rivertown Waterfront	Transit Town Center	1,600	3,420	1,830		1,430	3,330	1,900	
Brentwood		***17,520***	***18,370***	***850***	***5%***	***16,490***	***17,660***	***1,160***	***7%***
Clayton		***4,090***	***4,200***	***110***	***3%***	***4,010***	***4,120***	***110***	***3%***
Concord		***47,130***	***65,170***	***18,040***	***38%***	***44,280***	***63,160***	***18,880***	***43%***
Community Reuse Area	Regional Center	150	3,420	3,270		70	3,320	3,240	
Community Reuse Area	Transit Neighborhood	0	9,120	9,120		0	8,960	8,960	
Downtown	City Center	4,600	7,740	3,140		4,200	7,530	3,320	
Danville		***15,930***	***17,430***	***1,500***	***9%***	***15,420***	***16,910***	***1,490***	***10%***
Downtown Danville	Transit Town Center	1,450	2,200	750		1,370	2,120	760	
El Cerrito		***10,720***	***12,000***	***1,280***	***12%***	***10,140***	***11,550***	***1,410***	***14%***
San Pablo Avenue Corridor	Mixed-Use Corridor	1,340	2,360	1,020		1,220	2,280	1,060	
Hercules		***8,550***	***13,070***	***4,510***	***53%***	***8,120***	***12,680***	***4,570***	***56%***
Central Hercules	Transit Neighborhood	410	2,850	2,440		400	2,800	2,400	
Waterfront District	Transit Town Center	690	1,700	1,020		640	1,660	1,020	
Lafayette		***9,650***	***11,020***	***1,370***	***14%***	***9,220***	***10,640***	***1,420***	***15%***
Downtown	Transit Town Center	2,030	2,970	940		1,890	2,880	990	
Martinez		***14,980***	***16,240***	***1,260***	***8%***	***14,290***	***15,690***	***1,400***	***10%***
Downtown	Transit Neighborhood	820	1,510	690		750	1,460	710	
Moraga		***5,750***	***6,540***	***790***	***14%***	***5,570***	***6,350***	***780***	***14%***
Moraga Center	Transit Town Center	440	780	340		430	760	330	
Oakley		***11,480***	***17,010***	***5,530***	***48%***	***10,730***	***16,450***	***5,720***	***53%***
Downtown	Transit Town Center	560	1,740	1,180		520	1,690	1,170	
Employment Area	Suburban Center	580	1,480	900		560	1,450	890	
Potential Planning Area	Transit Neighborhood	1,060	2,310	1,250		980	2,240	1,260	
Orinda		***6,800***	***7,610***	***800***	***12%***	***6,550***	***7,450***	***900***	***14%***
Downtown	Transit Town Center	230	440	210		330	530	210	
Pinole		***7,160***	***8,240***	***1,080***	***15%***	***6,780***	***7,970***	***1,200***	***18%***
Appian Way Corridor	Suburban Center	560	1,150	590		520	1,110	590	
Old Town	Transit Town Center	1,430	1,540	110		1,300	1,470	180	
Pittsburg		***21,130***	***28,510***	***7,380***	***35%***	***19,530***	***27,500***	***7,980***	***41%***
Downtown	Transit Neighborhood	1,870	3,700	1,820		1,600	3,540	1,950	
Railroad Avenue eBART Station	Transit Town Center	3,930	7,470	3,530		3,600	7,240	3,640	
Pleasant Hill		***14,320***	***15,530***	***1,210***	***8%***	***13,710***	***15,060***	***1,350***	***10%***
Buskirk Avenue Corridor	Mixed-Use Corridor	1,730	1,820	90		1,620	1,750	130	
Diablo Valley College	Transit Neighborhood	360	660	300		330	640	310	
Richmond		***39,330***	***49,020***	***9,690***	***25%***	***36,090***	***47,090***	***10,990***	***30%***
Central Richmond & 23rd Street Corridor	Mixed-Use Corridor	5,930	7,250	1,320		5,340	6,940	1,610	
South Richmond	Transit Neighborhood	3,590	4,960	1,380		3,250	4,740	1,490	
San Pablo		***9,570***	***11,460***	***1,890***	***20%***	***8,760***	***11,030***	***2,270***	***26%***
San Pablo Avenue & 23rd Street	Mixed-Use Corridor	2,780	4,240	1,470		2,530	4,110	1,580	
Rumrill Boulevard	*Employment Center*	*430*	*430*	*0*		*400*	*410*	*20*	
San Ramon		***26,220***	***31,550***	***5,330***	***20%***	***25,280***	***30,720***	***5,440***	***22%***
City Center	Suburban Center	490	1,410	920		480	1,390	910	
North Camino Ramon	Transit Town Center	130	1,910	1,780		40	1,820	1,780	
Walnut Creek		***32,680***	***40,050***	***7,370***	***23%***	***30,440***	***38,520***	***8,070***	***27%***
West Downtown	Suburban Center	1,520	4,530	3,010		1,270	4,400	3,130	
Contra Costa County Unincorporated		***62,400***	***67,070***	***4,670***	***7%***	***57,710***	***63,740***	***6,040***	***10%***
Contra Costa Centre	Mixed-Use Corridor	1,910	2,380	470		1,780	2,310	530	
Downtown El Sobrante	Mixed-Use Corridor	1,810	2,290	480		1,670	2,190	510	
North Richmond	Transit Neighborhood	1,240	1,530	290		1,030	1,410	380	
Pittsburg/Bay Point BART Station	Transit Neighborhood	1,170	1,870	700		1,020	1,800	780	
West Contra Costa Transportation Advisory Committee									
San Pablo Avenue Corridor	Mixed-Use Corridor	4,230	6,700	2,470		3,900	6,480	2,590	

Household Growth by PDA and Jurisdiction

Marin County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Belvedere		***1,050***	***1,070***	***20***	***2%***	***930***	***970***	***40***	***4%***
Corte Madera		***4,030***	***4,250***	***230***	***6%***	***3,790***	***4,080***	***280***	***7%***
Fairfax		***3,590***	***3,790***	***210***	***6%***	***3,380***	***3,620***	***240***	***7%***
Larkspur		***6,380***	***6,770***	***390***	***6%***	***5,910***	***6,450***	***540***	***9%***
Mill Valley		***6,530***	***6,920***	***380***	***6%***	***6,080***	***6,540***	***450***	***7%***
Novato		***21,160***	***22,220***	***1,060***	***5%***	***20,280***	***21,450***	***1,170***	***6%***
Ross		***880***	***940***	***50***	***6%***	***800***	***860***	***60***	***8%***
San Anselmo		***5,540***	***5,790***	***250***	***5%***	***5,240***	***5,530***	***290***	***6%***
San Rafael		***24,010***	***27,400***	***3,390***	***14%***	***22,760***	***26,490***	***3,720***	***16%***
Civic Center/North Rafael Town Center	Transit Town Center	1,990	3,030	1,040		1,900	2,950	1,050	
Downtown	City Center	2,610	3,960	1,350		2,420	3,830	1,410	
Sausalito		***4,540***	***4,790***	***250***	***6%***	***4,110***	***4,460***	***350***	***9%***
Tiburon		***4,030***	***4,250***	***220***	***5%***	***3,730***	***4,000***	***270***	***7%***
Marin County Unincorporated		***29,500***	***30,550***	***1,050***	***4%***	***26,190***	***27,570***	***1,380***	***5%***
Urbanized 101 Corridor	Transit Neighborhood	4,580	5,020	440		4,290	4,810	510	

Napa County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
American Canyon		***5,980***	***7,890***	***1,910***	***32%***	***5,660***	***7,630***	***1,970***	***35%***
Highway 29 Corridor	Mixed-Use Corridor	440	1,980	1,540		400	1,930	1,530	
Calistoga		***2,320***	***2,370***	***50***	***2%***	***2,020***	***2,130***	***110***	***5%***
Napa		***30,150***	***33,410***	***3,270***	***11%***	***28,170***	***32,010***	***3,840***	***14%***
Downtown Napa	*Rural Town Center*	*150*	*640*	*490*		*130*	*620*	*490*	
Soscol Gateway Corridor	*Rural Corridor*	*640*	*1,090*	*450*		*600*	*1,050*	*450*	
St. Helena		***2,780***	***2,830***	***60***	***2%***	***2,400***	***2,520***	***120***	***5%***
Yountville		***1,250***	***1,280***	***30***	***2%***	***1,050***	***1,110***	***60***	***6%***
Napa County Unincorporated		***12,280***	***13,020***	***740***	***6%***	***9,580***	***10,880***	***1,300***	***14%***

San Francisco County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
San Francisco		***376,940***	***469,350***	***92,410***	***25%***	***345,810***	***447,250***	***101,440***	***29%***
19th Avenue	Transit Town Center	5,220	11,170	5,950		4,790	10,870	6,070	
Balboa Park	Transit Neighborhood	1,270	3,120	1,850		1,190	3,020	1,830	
Bayview/Hunters Point Shipyard/Candlestick Point	Urban Neighborhood	11,610	22,510	10,900		10,470	21,760	11,290	
Downtown-Van Ness-Geary	Regional Center	101,520	128,660	27,140		89,850	121,600	31,750	
Eastern Neighborhoods	Urban Neighborhood	34,270	45,690	11,420		31,650	43,810	12,160	
Market & Octavia	Urban Neighborhood	11,950	18,150	6,210		11,130	17,530	6,410	
Mission Bay	Urban Neighborhood	3,470	6,850	3,380		3,200	6,610	3,410	
Mission-San Jose Corridor	Mixed-Use Corridor	31,230	32,490	1,260		29,360	30,880	1,510	
Port of San Francisco	Mixed-Use Corridor	120	1,950	1,830		110	1,910	1,800	
San Francisco/San Mateo Bi-County Area (with Brisbane)	Transit Neighborhood	1,630	6,880	5,250		1,510	6,720	5,210	
Transbay Terminal	Regional Center	490	5,210	4,720		190	4,990	4,800	
Treasure Island	Transit Town Center	690	7,950	7,270		590	7,740	7,160	

Household Growth by PDA and Jurisdiction

San Mateo County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
Atherton		***2,530***	***2,750***	***220***	***9%***	***2,330***	***2,580***	***250***	***11%***
Belmont		***11,030***	***12,150***	***1,120***	***10%***	***10,580***	***11,790***	***1,210***	***11%***
Villages of Belmont	Mixed-Use Corridor	920	1,830	910		890	1,780	900	
Brisbane		***1,930***	***2,180***	***250***	***13%***	***1,820***	***2,090***	***270***	***15%***
San Francisco/San Mateo Bi-County Area (with San Francisco)	Suburban Center	0	0	0		0	0	0	
Burlingame		***13,030***	***17,320***	***4,300***	***33%***	***12,360***	***16,780***	***4,420***	***36%***
Burlingame El Camino Real	Transit Town Center	7,610	10,870	3,260		7,170	10,530	3,360	
Colma		***590***	***830***	***240***	***41%***	***560***	***810***	***240***	***43%***
Daly City		***32,590***	***36,890***	***4,300***	***13%***	***31,090***	***35,770***	***4,680***	***15%***
Bayshore	Transit Town Center	1,590	3,580	1,990		1,550	3,510	1,960	
Mission Boulevard	Mixed-Use Corridor	2,270	3,310	1,050		2,070	3,210	1,140	
East Palo Alto		***7,820***	***8,670***	***860***	***11%***	***6,940***	***8,340***	***1,400***	***20%***
Ravenswood	Transit Town Center	1,030	1,880	860		970	1,830	860	
Foster City		***12,460***	***13,350***	***890***	***7%***	***12,020***	***12,940***	***920***	***8%***
Half Moon Bay		***4,400***	***4,660***	***260***	***6%***	***4,150***	***4,410***	***260***	***6%***
Hillsborough		***3,910***	***4,230***	***310***	***8%***	***3,690***	***4,010***	***320***	***9%***
Menlo Park		***13,090***	***15,080***	***1,990***	***15%***	***12,350***	***14,510***	***2,160***	***17%***
El Camino Real Corridor and Downtown	Transit Town Center	1,130	2,050	910		1,010	1,980	970	
Millbrae		***8,370***	***11,390***	***3,020***	***36%***	***7,990***	***11,050***	***3,060***	***38%***
Transit Station Area	Mixed-Use Corridor	280	2,710	2,420		270	2,650	2,380	
Pacifica		***14,520***	***15,120***	***600***	***4%***	***13,970***	***14,640***	***670***	***5%***
Portola Valley		***1,900***	***2,020***	***130***	***7%***	***1,750***	***1,900***	***150***	***9%***
Redwood City		***29,170***	***37,880***	***8,720***	***30%***	***27,960***	***36,850***	***8,890***	***32%***
Downtown	City Center	1,060	6,300	5,240		990	6,180	5,190	
Broadway/Veterans Boulevard Corridor	Mixed-Use Corridor	770	2,300	1,530		730	2,250	1,520	
San Bruno		***15,360***	***19,820***	***4,460***	***29%***	***14,700***	***19,170***	***4,470***	***30%***
Transit Corridors	Mixed-Use Corridor	4,330	7,660	3,330		4,140	7,450	3,310	
San Carlos		***12,020***	***13,800***	***1,780***	***15%***	***11,520***	***13,390***	***1,860***	***16%***
Railroad Corridor	Transit Town Center	460	1,230	770		440	1,200	760	
San Mateo		***40,010***	***50,180***	***10,160***	***25%***	***38,230***	***48,600***	***10,370***	***27%***
Downtown	City Center	540	1,610	1,070		500	1,560	1,060	
El Camino Real	Mixed-Use Corridor	880	2,080	1,200		840	2,030	1,200	
Rail Corridor	Transit Neighborhood	520	5,540	5,030		500	5,440	4,940	
South San Francisco		***21,810***	***28,730***	***6,920***	***32%***	***20,940***	***27,900***	***6,960***	***33%***
Downtown	Transit Town Center	1,590	4,700	3,120		1,510	4,590	3,090	
Woodside		***2,160***	***2,250***	***90***	***4%***	***1,980***	***2,080***	***100***	***5%***
San Mateo County Unincorporated		***22,350***	***27,440***	***5,080***	***23%***	***20,910***	***26,130***	***5,220***	***25%***
Midcoast	*Rural Corridor*	*3,900*	*4,900*	*1,000*		*3,670*	*4,660*	*990*	
City County Association of Governments of San Mateo County									
El Camino Real	Mixed-Use Corridor	2,540	6,180	3,630		2,400	6,030	3,630	

Household Growth by PDA and Jurisdiction

Santa Clara County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Campbell		***16,950***	***19,990***	***3,040***	***18%***	***16,160***	***19,430***	***3,270***	***20%***
Central Redevelopment Area	Transit Neighborhood	1,340	2,820	1,470		1,260	2,750	1,490	
Cupertino		***21,030***	***25,820***	***4,790***	***23%***	***20,180***	***25,050***	***4,870***	***24%***
Gilroy		***14,850***	***17,570***	***2,710***	***18%***	***14,180***	***17,040***	***2,860***	***20%***
Downtown	Transit Town Center	980	2,900	1,930		880	2,820	1,940	
Los Altos		***11,200***	***12,300***	***1,100***	***10%***	***10,750***	***11,840***	***1,100***	***10%***
Los Altos Hills		***3,000***	***3,100***	***100***	***3%***	***2,830***	***2,940***	***110***	***4%***
Los Gatos		***13,050***	***13,820***	***770***	***6%***	***12,360***	***13,220***	***860***	***7%***
Milpitas		***19,810***	***32,430***	***12,620***	***64%***	***19,180***	***31,680***	***12,500***	***65%***
Transit Area	Suburban Center	790	7,870	7,080		750	7,720	6,970	
Monte Sereno		***1,290***	***1,370***	***80***	***6%***	***1,210***	***1,290***	***80***	***7%***
Morgan Hill		***12,860***	***16,690***	***3,830***	***30%***	***12,330***	***16,150***	***3,820***	***31%***
Downtown	Transit Town Center	570	1,990	1,420		510	1,930	1,420	
Mountain View		***33,880***	***43,270***	***9,390***	***28%***	***31,960***	***41,790***	***9,830***	***31%***
Downtown	Transit Town Center	5,240	6,390	1,150		4,790	6,030	1,240	
East Whisman	*Employment Center*	*720*	*720*	*0*		*690*	*690*	*0*	
El Camino Real Corridor	Mixed-Use Corridor	9,190	11,150	1,960		8,740	10,830	2,090	
North Bayshore	Suburban Center	360	1,790	1,420		350	1,750	1,410	
San Antonio Center	Transit Town Center	3,590	6,350	2,760		3,420	6,180	2,770	
Whisman Station	Transit Neighborhood	670	1,670	1,010		650	1,640	990	
Palo Alto		***28,220***	***35,620***	***7,410***	***26%***	***26,490***	***34,360***	***7,870***	***30%***
California Avenue	Transit Neighborhood	800	1,650	850		750	1,600	850	
San Jose		***314,040***	***443,210***	***129,170***	***41%***	***301,370***	***431,910***	***130,550***	***43%***
Bascom TOD Corridor	Mixed-Use Corridor	680	2,240	1,560		650	2,190	1,540	
Bascom Urban Village	Mixed-Use Corridor	1,780	2,590	810		1,670	2,520	850	
Berryessa Station	Transit Neighborhood	1,880	7,990	6,110		1,850	7,850	6,000	
Blossom Hill/Snell Urban Village	Mixed-Use Corridor	640	1,720	1,080		610	1,680	1,070	
Camden Urban Village	Mixed-Use Corridor	490	1,480	1,000		480	1,460	980	
Capitol Corridor Urban Villages	Mixed-Use Corridor	860	7,100	6,240		820	6,960	6,140	
Capitol/Tully/King Urban Villages	Suburban Center	1,090	3,340	2,250		1,060	3,270	2,210	
Communications Hill	Transit Town Center	6,810	10,140	3,340		6,540	9,910	3,360	
Cottle Transit Village	Suburban Center	0	3,580	3,580		0	3,510	3,510	
Downtown "Frame"	City Center	18,120	28,210	10,090		16,980	27,410	10,440	
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	7,180	13,370	6,200		6,750	12,980	6,230	
Greater Downtown	Regional Center	4,590	19,750	15,150		3,670	19,310	15,640	
International Business Park	*Employment Center*	*200*	*200*	*0*		*190*	*190*	*0*	
North San Jose	Regional Center	10,880	43,730	32,850		10,420	42,820	32,400	
Oakridge/Almaden Plaza Urban Village	Suburban Center	1,910	9,200	7,300		1,790	9,020	7,240	
Old Edenvale	*Employment Center*	*150*	*150*	*0*		*140*	*140*	*0*	
Saratoga TOD Corridor	Mixed-Use Corridor	2,430	3,550	1,120		2,340	3,460	1,130	
Stevens Creek TOD Corridor	Mixed-Use Corridor	2,620	7,800	5,170		2,500	7,620	5,120	
West San Carlos & Southwest Expressway Corridors	Mixed-Use Corridor	11,150	20,960	9,810		10,320	20,410	10,100	
Westgate/El Paseo Urban Village	Suburban Center	850	3,340	2,490		800	3,270	2,480	
Winchester Boulevard TOD Corridor	Mixed-Use Corridor	4,850	6,850	2,000		4,630	6,690	2,050	
Santa Clara		***45,150***	***58,920***	***13,770***	***30%***	***43,020***	***57,240***	***14,220***	***33%***
El Camino Real Focus Area	Mixed-Use Corridor	1,840	5,400	3,560		1,650	5,220	3,580	
Santa Clara Station Focus Area	City Center	480	3,880	3,410		450	3,800	3,350	
Saratoga		***11,120***	***11,750***	***630***	***6%***	***10,730***	***11,350***	***620***	***6%***
Sunnyvale		***55,790***	***74,780***	***18,990***	***34%***	***53,380***	***72,760***	***19,380***	***36%***
Downtown & Caltrain Station	Transit Town Center	1,840	3,810	1,980		1,730	3,710	1,980	
East Sunnyvale	Urban Neighborhood	1,020	4,270	3,260		950	4,170	3,220	
El Camino Real Corridor	Mixed-Use Corridor	10,990	15,400	4,410		10,350	14,940	4,590	
Lawrence Station Transit Village	Transit Neighborhood	1,660	5,210	3,550		1,560	5,100	3,540	
Moffett Park	*Employment Center*	*20*	*20*	*0*		*20*	*20*	*0*	
Peery Park	*Employment Center*	*130*	*130*	*0*		*110*	*120*	*10*	
Reamwood Light Rail Station	*Employment Center*	*0*	*0*	*0*		*0*	*0*	*0*	
Tasman Station ITR	Mixed-Use Corridor	1,440	3,270	1,830		1,390	3,200	1,810	
Santa Clara County Unincorporated		***29,690***	***32,490***	***2,800***	***9%***	***28,080***	***31,060***	***2,980***	***11%***
Valley Transportation Authority									
Cores, Corridors, and Station Areas	*Mixed-Use Corridor*	*48,380*	*67,690*	*19,300*		*46,070*	*65,750*	*19,680*	

Household Growth by PDA and Jurisdiction

Solano County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Benicia		***11,310***	***12,680***	***1,380***	***12%***	***10,690***	***12,240***	***1,560***	***15%***
Downtown	Transit Neighborhood	600	1,530	930		530	1,480	950	
Northern Gateway	*Employment Center*	0	0	0		0	0	0	
Dixon		***6,170***	***6,660***	***480***	***8%***	***5,860***	***6,430***	***570***	***10%***
Downtown	*Rural Town Center*	*740*	*990*	*250*		*690*	*960*	*270*	
Fairfield		***37,180***	***48,280***	***11,100***	***30%***	***34,480***	***46,410***	***11,930***	***35%***
Downtown South (Jefferson Street)	Suburban Center	680	1,100	420		600	1,060	460	
Fairfield-Vacaville Train Station	Transit Town Center	410	6,450	6,040		90	6,050	5,960	
North Texas Street Core	Mixed-Use Corridor	1,770	3,470	1,700		1,600	3,370	1,770	
West Texas Street Gateway	Mixed-Use Corridor	1,120	3,550	2,430		1,020	3,450	2,440	
Rio Vista		***3,890***	***4,260***	***370***	***10%***	***3,450***	***3,950***	***500***	***14%***
Downtown	*Rural Town Center*	*360*	*720*	*360*		*300*	*680*	*380*	
Suisun City		***9,450***	***10,820***	***1,360***	***14%***	***8,920***	***10,490***	***1,570***	***18%***
Downtown & Waterfront	Transit Town Center	1,180	2,230	1,040		1,090	2,160	1,060	
Vacaville		***32,810***	***36,910***	***4,100***	***12%***	***31,090***	***35,860***	***4,770***	***15%***
Allison Area	Suburban Center	610	700	100		550	690	130	
Downtown	Transit Town Center	250	940	690		220	920	690	
Vallejo		***44,430***	***46,960***	***2,530***	***6%***	***40,560***	***44,880***	***4,320***	***11%***
Waterfront & Downtown	Suburban Center	1,130	1,970	840		980	1,920	950	
Solano County Unincorporated		***7,450***	***8,940***	***1,500***	***20%***	***6,710***	***8,390***	***1,680***	***25%***

Sonoma County

		HOUSING UNITS				HOUSEHOLDS			
Jurisdiction or Area Name	**Place Type**	**2010**	**2040**	**2010-2040**	**% Growth**	**2010**	**2040**	**2010-2040**	**% Growth**
Cloverdale		***3,430***	***4,210***	***790***	***23%***	***3,180***	***4,040***	***860***	***27%***
Downtown/SMART Transit Area	Transit Town Center	1,150	1,880	730		1,040	1,800	760	
Cotati		***3,140***	***3,650***	***510***	***16%***	***2,980***	***3,530***	***550***	***18%***
Downtown and Cotati Depot	Transit Town Center	890	1,290	400		830	1,250	410	
Healdsburg		***4,800***	***5,000***	***200***	***4%***	***4,390***	***4,650***	***260***	***6%***
Petaluma		***22,740***	***25,430***	***2,690***	***12%***	***21,740***	***24,610***	***2,880***	***13%***
Central, Turning Basin/Lower Reach	Suburban Center	810	2,570	1,760		750	2,500	1,750	
Rohnert Park		***16,550***	***20,150***	***3,600***	***22%***	***15,810***	***19,590***	***3,780***	***24%***
Central Rohnert Park	Transit Town Center	1,360	2,320	960		1,300	2,270	970	
Sonoma Mountain Village	Suburban Center	200	2,210	2,010		200	2,170	1,980	
Santa Rosa		***67,400***	***83,420***	***16,020***	***24%***	***63,590***	***80,560***	***16,970***	***27%***
Downtown Station Area	City Center	2,230	6,130	3,890		2,080	5,980	3,900	
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	7,310	9,820	2,510		6,810	9,510	2,700	
North Santa Rosa Station	Suburban Center	4,240	6,200	1,960		3,960	6,040	2,090	
Roseland	Transit Neighborhood	3,570	6,480	2,910		3,400	6,300	2,900	
Sebastopol Road Corridor	Mixed-Use Corridor	2,990	8,280	5,290		2,750	8,050	5,300	
Sebastopol		***3,470***	***3,890***	***420***	***12%***	***3,280***	***3,710***	***430***	***13%***
Nexus Area	*Rural Town Center*	2,510	2,890	390		2,360	2,750	400	
Sonoma		***5,540***	***5,840***	***300***	***5%***	***4,960***	***5,390***	***430***	***9%***
Windsor		***9,540***	***11,460***	***1,910***	***20%***	***8,960***	***10,870***	***1,910***	***21%***
Redevelopment Area	Suburban Center	1,430	2,640	1,200		1,370	2,550	1,190	
Sonoma County Unincorporated		***67,970***	***73,400***	***5,430***	***8%***	***56,950***	***63,730***	***6,780***	***12%***
Forestville	*Rural Town Center*	*990*	*1,390*	*400*		*890*	*1,290*	*400*	
Graton	*Rural Town Center*	*570*	*1,000*	*440*		*530*	*960*	*430*	
Guerneville	*Rural Town Center*	*460*	*870*	*410*		*370*	*780*	*410*	
Penngrove Urban Service Area	*Rural Town Center*	*440*	*820*	*380*		*420*	*790*	*380*	
The Springs	*Rural Corridor*	*5,110*	*6,200*	*1,090*		*4,700*	*5,850*	*1,150*	

Appendix B: Jobs-Housing Connection Growth Methodology

Housing Distribution Methodology

The housing distribution takes into account local input and key sustainability, equity, and economic factors. These factors utilize new data sources that better identifies sustainable locations for growth and planned levels of development.[1] The housing distribution is linked to existing and future transit service and expected level of greenhouse gas emissions from each area of the region, with the goal of utilizing the existing transit infrastructure efficiently and directing growth to places that can provide the best opportunity for emissions reductions. However, growth in each place is tied directly to housing potential that has been defined by local jurisdictions..

Data Sources

2010 Census Summary File 1 (U. S. Census Bureau)
The U.S. Census counts every resident in the United States. It is mandated by Article I, Section 2 of the Constitution and takes place every 10 years. National and state population totals from the 2010 Decennial Census were released on December 21, 2010. Redistricting data, which include additional state, county and local counts, were released starting in February 2011. Decennial Census population, housing unit, housing vacancy (including seasonal vacancies), and household data for the region were obtained from the 2010 Census Summary File 1:
http://factfinder2.census.gov/main.html

Longitudinal Employment and Household Dynamics (U. S. Census Bureau)
The Longitudinal Employment and Household Dynamics (LEHD) program uses statistical and computing techniques to combine federal and state administrative data on employers and employees with core Census Bureau censuses and surveys. The program provides employment statistics on employment, job creation, turnover, and earnings by industry, age and sex at the local, state, county and sub-county. More information on the LEHD data is available at:
http://lehd.did.census.gov/led/

Regional Travel Demand Model (MTC)
Vehicle miles traveled (VMT) data at the Transportation Analysis Zone (TAZ) level from the Alternative Scenarios were obtained via MTC's Regional Travel Demand Model.

UrbanSim (UCBerkeley, Purdue University)
UrbanSim is a software-based urban development simulation model incorporating land use, transportation, economic, and environmental factors. Housing development potential data was obtained via the model's land use database, which includes current local general plan land use and zoning designations. http://www.urbansim.org/Main/WebHome

[1] The regional housing distribution factors reflect the policy intent of the ABAG Executive Board to support equitable and sustainable development by "maximizing the regional transit network and reducing GHG emissions by providing convenient access to employment for people of all incomes by distributing total housing growth numbers to: a) job-rich cities that have PDAs or additional areas that are PDA-like; b) connected to the existing transit infrastructure; and c) lack the affordable housing needed to accommodate low-income commuters." ABAG Executive Board Meeting Summary Minutes, No. 381, p. 9. July 21, 2011. http://abag.ca.gov/abag/events/agendas/e091511a-Item%2006.A.pdf

National Establishment Times-Series (Walls & Associates / Dun and Bradstreet)
Walls & Associates converts Dun and Bradstreet archival establishment data into a time-series database of establishment information called the National Establishment Times-Series (NETS) Database. The NETS data is gathered by individual business and includes number of jobs, industry type, and location. ABAG has analyzed the NETS data to provide information on the spatial distribution of jobs at the jurisdiction and PDA level by employment sector, as well as changes in spatial distribution at these geographies from 1989-2009. More information on the NETS data is available at: http://www.youreconomy.org/nets/?region=Walls

Housing Distribution Factors

Locally-based Development Potential

Housing development potential was used as the basis for distributing household growth to each area. The potential for housing development up to 2040 for each place was determined from existing and future land use data and local growth potential information from the following three sources:

1. **Local input on SCS scenarios**
   Local feedback on the SCS scenarios through letters, emails, meetings, and the SCS Basecamp forum, the PDA Assessment, and new applications for PDA designation provided detailed information on planned growth in specific PDAs and jurisdictions and constraints to growth.

2. **PDA Place Types**
   Locally-selected place types by PDA served as a reference on the scale of growth proposed in each PDA.

3. **Land Use Data**
   ABAG collects existing and planned land use data from local jurisdictions. The land use database, currently being used in the UrbanSim model, includes local zoning and general plan designations along with allowable densities and intensities for development. Development potential up to 2040 for each area within the region was determined via analysis of these local zoning and land use designations. The land use database includes information from adopted general plans and zoning ordinances only, so the capacity reflected in the scenarios may reflect lower (or higher) capacity than what jurisdictions are currently planning.

Sustainability, Equity and Economic Factors

1. **Transit**
   Each area throughout the region was identified by its highest level of transit service. Growth was distributed based on transit tiers, with the goal of utilizing the existing transit infrastructure more efficiently; places with high levels of transit service were directed commensurately more growth.

Transit Tiers:

Tier 1: BART, Muni Metro, VTA Light Rail, Caltrain

High-frequency heavy rail and light rail: locations with substantial existing transit investments that generally provide higher-frequency access region-wide, particularly to major job centers

Tier 2: ACE, Amtrak Capital Corridor, SMART, eBART, Bus Rapid Transit (BRT) corridors

Low-frequency heavy/commuter rail, future heavy rail, BRT/rapid bus corridors: locations with less convenient access to major job centers and future transit investment areas, generally providing access sub-regionally, rather than region-wide

Tier 3: All other transit (bus, ferry, etc.)

Locations served by lowest frequency and more locally-serving transit

2. **Vehicle Miles Traveled per Household**
Vehicle Miles Traveled (VMT) data[2] for each PDA and non-PDA area is available from MTC's Regional Travel Demand Model. A 2040 VMT per household measure for each geographic sub-area used in the distribution analysis was calculated from 2040 VMT by Transportation Analysis Zone (TAZ) modeled from the best-performing SCS Alternative Scenario. This measure was used in the distribution to identify the places that are expected to result in the lowest greenhouse gas emissions (the VMT per household measure is highly correlated with greenhouse gas emissions). Each place was categorized by VMT tier, shown below.

VMT per Household Tiers:

Tier 1: 0-25 vmt/hh
Tier 2: 25-35 vmt/hh
Tier 3: 35-45 vmt/hh
Tier 4: 45+ vmt/hh

3. **Current housing vacancy and seasonal housing data**
To account for current vacant housing units, identified via the 2010 U.S. Census, vacancy absorption was factored into the housing distribution. Vacancy absorption is the number of existing vacant units that are available to accommodate new households in an area; it reduces the total number of new units that will have to be built in an area to accommodate growth to 2040.

Seasonal housing units and seasonal vacancies were also accounted for in the distribution. These units were removed from the analysis to ensure that they were not counted as available for occupancy by households.

4. **Employment Factor**
To link housing growth more closely to job centers, the initial housing distribution was adjusted by an employment adjustment factor for each area, based on the Jobs-Housing Connection Scenario 2040 employment for each jurisdiction.

[2] VMT by place of residence for all home-based trips was used for the housing distribution.

5. **Net Low-income In-commuting Factor**
   To shift growth to places that are importing many low-income workers, a net low-income in-commuting factor was used to adjust the initial housing distribution. U.S. Census Bureau LEHD data was used to determine the number of workers commuting to and from the jurisdiction by income category in 2009 and previous years.

6. **Housing Value Factor**
   To shift housing growth to places that offer high quality services (schools, infrastructure, parks, etc.), the initial housing distribution was adjusted by a housing value factor, based on jurisdictional median home value.

Methodology

1. Housing unit growth was added to each PDA's and non-PDA area's 2010 housing unit value based on each area's housing development potential, adjusted by Transit-VMT Tier growth adjustment rates and distributed via the steps described below.

Transit-VMT Tier Adjustment Rates

Transit Tier	VMT Tier	Growth Adjustment Rate
1	1	1.1
1	2	1.25
1	3	1.2
1	4	1.15
2	1	1.25
2	2	1.2
2	3	1.15
2	4	1
3	1	1.2
3	2	1
3	3	1
3	4	0.75

Housing Distribution Steps

Step	Area	Base Housing Unit Growth	Growth Adjustment
1	Any VMT Tier 1 area	PDAs: Local feedback level of growth Other areas: land use development potential	Maximum of Base Growth or Transit-VMT Tier Rate x Base Growth. *No adjustment for PDA areas if planned level of growth exceeds Place Type mid-point unit level.*
2	All remaining PDAs (excluding Employment Centers): VMT Tiers 2, 3, 4	Local feedback level of growth	Maximum of Base Growth or Transit-VMT Tier Rate x Base Growth. *No adjustment for PDA areas if planned level of growth exceeds Place Type mid-point unit level.*

Step	Area	Base Housing Unit Growth	Growth Adjustment
3	All remaining non-PDA areas (excluding areas outside of Urban Growth Boundaries/Urban Limit Lines		Remainder of Regional Control Total x Core Constrained Alternative Scenario Share of Growth x Transit-VMT Tier Rate (less vacant housing units for places with vacancy >10%)

2. Additional units were distributed to key job centers and locations along the core transit network, including PDAs and non-PDA areas in the following cities: Burlingame, Millbrae, Oakland, Pleasanton, Redwood City, San Francisco, San Jose, San Mateo, San Ramon, Santa Clara, South San Francisco, Sunnyvale, and Walnut Creek. These areas were generally identified based on 2010 and 2040 level of employment, 2010 jobs-housing ratio, and level of transit service (particularly BART and Caltrain).

3. Growth in all areas was adjusted plus or minus 10 percent based on the combined adjustment factors:
   a. Housing Value (weight = 3)
   b. Net Low-income In-commuting (weight = 2)
   c. 2040 Employment (weight = 1)

4. Jurisdictional levels of growth were checked. For jurisdictions with BART or Caltrain stations, or with a VMT per household value less than 35, growth was adjusted upward to meet locally-identified levels of growth if the growth allocated after step 3 fell short of this.

5. Vacancy absorption was factored in for each area to obtain household growth.

6. The jurisdictional level of growth was adjusted up or down based on feedback, ensuring that growth in each place meets at least 5% of existing units (for jurisdictions with population greater than 10,000). Growth from areas exceeding 115% of their locally-identified level of growth was re-balanced to areas receiving less than 75% of their locally-identified level of growth. Only 70% of the total units over-allocated were re-distributed to under-allocated jurisdictions. The result is that the level of growth in some jurisdictions may still exceed the 115% threshold.

Employment Distribution Methodology

The employment distribution takes into account employment growth by sector and is linked to transit infrastructure and local input. Employment growth is organized under three major groups: knowledge-sector jobs, population-serving jobs, and all other jobs. The knowledge-sector jobs are expected to grow based on current concentration, specialization, and past growth as well as transit service and access. Population-serving jobs, such as retail stores are expected to grow based on residential growth. All other jobs are expected to grow according to the existing distribution of jobs in each of these sectors.

Data Sources

California Department of Transportation Sector Forecast (Caltrans)
Caltrans uses an econometric model to project employment by industry out to 2040 for each county in California. The agency's model uses variables and assumptions taken from the UCLA Anderson Forecast and historic employment data from EDD. The most recent projections were released in August 2011, titled *California County-Level Economic Forecast: 2011-2040*. In comparison, the most recent EDD and BLS projections available date from 2008 and 2009. A complete description of the 2011 Caltrans projection methodology and data out to 2040 is available at: http://www.dot.ca.gov/hq/tpp/offices/eab/socio_economic.html.

Center for Continuing Study of the California Economy (CCSCE)
Stephen Levy at CCSCE uses national short-term and long-term economic and demographic forecasts to prepare long-term regional economic projections by industry sector. Details on the CCSCE methodology and analysis are provided in a report, *Bay Area Job Growth to 2040: Projections and Analysis*.

Walls & Associates / Dun and Bradstreet (NETS)
Walls & Associates converts Dun and Bradstreet archival establishment data into a time-series database of establishment information called the National Establishment Times-Series (NETS) Database. ABAG has analyzed the NETS data to provide information on the spatial distribution of jobs at the jurisdiction and PDA level by employment sector, as well as changes in spatial distribution at these geographies from 1989-2009. More information on the NETS data is available at: http://www.youreconomy.org/nets/?region=Walls

Methodology

2010 Employment Distribution

Current employment is based on total jobs by sector as detailed in the CCSCE report. This is derived from California Employment Development Department wage and salary job estimates plus estimates for self employed workers developed from the 1990 and 2000 Census and American Community Survey annual estimates. The distribution to the counties is based upon 2010 sector totals by county from the Caltrans forecast. NETS data is used to distribute jobs by PDA and jurisdiction for each sector within each county.

2040 Employment Distribution

Total regional employment

The 2040 total job number was established from an analysis of economic and demographic trends, housing production, and policy direction to reduce reliance upon in-commuting to provide additional workforce for future Bay Area jobs. The 2040 job, population, and household totals provide a consistent set of demographic projections that accounts for: future age and ethnic demographic changes (DoF forecast), labor force participation rates (BLS), headship rates (HCD/DOF/ACS), group quarter and institutional shares of population (ACS), and normalized future unemployment and vacancy rates (5.1% and 4%, respectively).

Employment by economic sector and county

The composition of employment in 2040 by different industry sectors is based upon *Bay Area Job Growth to 2040: Projections and Analysis*, prepared by Stephen Levy at the Center for Continuing Study of the California Economy. This report uses a shift-share methodology (calculating regional growth as a share of national growth by industry sector) to project the future composition of Bay Area employment among the broad 2-digit NAICS industry sectors.

The distribution of 2040 employment among the nine counties for each industry sector is based upon county shares of regional employment in Caltrans' *California County-Level Economic Forecast: 2011-2040*. The agency's econometric model uses variables and assumptions taken from the UCLA Anderson Forecast and historic employment data from EDD.

The distribution of employment by jurisdiction and Priority Development Area was then calculated as a share of county growth for each industry sector.

Employment by jurisdiction and Priority Development Area

The distribution of employment at the jurisdiction and Priority Development Area geographies relies upon three basic approaches depending upon the type of job:

1. Population-serving jobs: For jobs that provide services to households, employment location is dependent upon where people live. As a result, growth of these jobs was distributed at the jurisdiction and PDA geography based upon the spatial distribution of household growth in the region. Residential construction jobs were also included in this category, as they will be located where new housing is built. Based upon an analysis of Bay Area employment at the 4-digit NAICS categories, jobs in this category included 14% of new Construction jobs, 48% of new Retail jobs, 60% of Health and Education jobs, and 36% of Leisure and Hospitality sector jobs.

2. Knowledge-sector jobs: For jobs in Professional and Business Services, Information, and Finance, a Knowledge Strength Index was used to weight the distribution of jobs within each county at the jurisdiction level. The index weights jurisdiction growth based upon the following factors: Average total employment 1990-2010 (10%); average knowledge-sector employment 1990-2010 (10%); Knowledge-sectors county location quotient 2010 (20%); share of county's jobs 2010 (10%); share of knowledge-sector job growth in county 1990-2000 (10%); employees per square mile 2010 (15%); average combined headway 2009 (20%);

and share of intersections in jurisdiction with transit (5%) [Employment data from NETS, transit data from MTC]. This index reflects the tendency of these jobs to prefer locations with already high concentrations of similar companies and a shared labor pool. The maximum deviations for any jurisdiction from existing shares in these sectors based upon the index weighting was +9% and -3% of county growth. The index allocation to jurisdictions was adjusted downward for smaller residential communities with limited land capacity to increase employment. Priority Development Areas received a 10% increase in share of jurisdiction growth in these sectors over existing shares.

3. All other jobs: For the remaining sectors, employment growth was distributed based upon the existing distribution in 2010 as derived from analysis of NETS establishment data. This data provides employment information by location of a business establishment. This is a high level of geographical resolution, which allows us to capture the employment by PDA more accurately than previous zip code data.

Following the distribution outlined above, staff reviewed job capacity information for Priority Development Areas provided by local jurisdictions (either directly as feedback on prior scenarios, in PDA application materials and assessment surveys, or in regional land use data collected by ABAG). Where there was additional job growth in a jurisdiction and capacity identified for that growth in Priority Development Areas, the PDA employment numbers were increased to reflect the local plans. Additionally, shifts among PDAs within a jurisdiction were made to better reflect where growth was planned for by local jurisdictions.

Regional Projection Economic and Demographic Assumptions

Regional Totals (in millions)

	1990	2000	2010	2020	2030	2040
Housing Units		2.552	2.786	2.956	3.201	3.446
Households	2.251	2.466	2.608	2.838	3.073	3.308
Group Quarters Population	0.149	0.143	0.148	0.162	0.182	0.214
Population	6.024	6.784	7.151	7.787	8.497	9.299
Labor Force	3.322	3.535	3.658	4.057	4.270	4.584
Employed Residents	3.152	3.377	3.269	3.850	4.052	4.350
Jobs	3.206	3.753	3.385	3.987	4.197	4.505

Rates

	1990	2000	2010	2020	2030	2040
Vacancy Rate		3.4	6.4	4.0	4.0	4.0
Persons per Household	2.61	2.69	2.69	2.69	2.71	2.75
Labor Force Participation Rate	55.6	52.6	51.6	52.6	50.8	49.8
Unemployment	5.1	4.5	10.6	5.1	5.1	5.1
Employed Residents per Job	0.983	0.900	0.966	0.966	0.966	0.966

Population Profile
The age and ethnic composition of the region's future growth comes from:
State of California, Department of Finance, *Population Projections for California and Its Counties 2000-2050*, Sacramento, California, July 2007. For each decade, the growth shares by age and ethnic composition were added to the 2010 base population profile from Census 2010 to get future year age and ethnic total population profiles. The net migration assumption for the Department of Finance forecast averages 177,000 statewide over the 50-year period, or approximately 35% of the growth. This is the source for the composition of population growth, not the level of total growth.

Housing Units
A thirty-year average housing production level of 22,000 is assumed. This is based upon an analysis of past production, challenges associated with increasing the inventory of multi-family housing brought to market, and future policy supports, acknowledging that high housing costs and limited production is a factor constraining the ability of the region to accommodate future job growth.

Vacant Units
Vacant units are calculated by an assumed future vacancy rate of 4% of total housing units in future years, due to regular turnover of the housing stock.

Households
Total households are calculated by subtracting vacant units from total housing units.

Persons per Household
Existing headship rates – the ratio of household population to heads of households – by age and ethnic group are derived from the 2005-2009 American Community Survey 5-year average estimate. The existing headship rates by age and ethnic group are applied to the future year household population profile to get the future persons per household for the Bay Area. Changes in headship are not assumed – the change in the overall persons per household over time is solely a result of the changing population profile of the region.

Household Population
Total household population is calculated by multiplying the future persons per household by the future total households.

Group Quarters Population
The future group quarters population is calculated as a share of total population. The share is calculated using Census 2010 rates of group quarter population by age applied to the future year population profile.

Population
Total population is calculated by adding household population and group quarters population.

Non-Institutionalized Population
Similar to the group quarters population, non-institutionalized population is calculated as a share of total population. The share is calculated using Census 2010 rates of non-institutionalized population by age applied to the future year population profile.

Labor Force Participation Rates

For future labor force participation rates, we rely on: United States Department of Labor, Bureau of Labor Statistics, *Labor force participation rates, 2008-2018* and *Labor force participation rates, to 2050*. The future national labor force participation rates by age and ethnic group are applied to the future non-institutionalized population profile. The overall rate is then adjusted based upon the difference in 2010 between national and regional labor force participation to get the future labor force participation rate for the Bay Area.

Labor Force

Labor force is calculated by multiplying the future year non-institutionalized population by the future labor force participation rate.

Unemployment Rate

The assumption is for full employment levels in future years. This is assumed as a 5.1% unemployment rate per the Bureau of Labor Statistics.

Employed Residents

Employed residents are calculated by subtracting the unemployed residents from the labor force. Unemployed residents are calculated by multiplying the labor force by the unemployment rate.

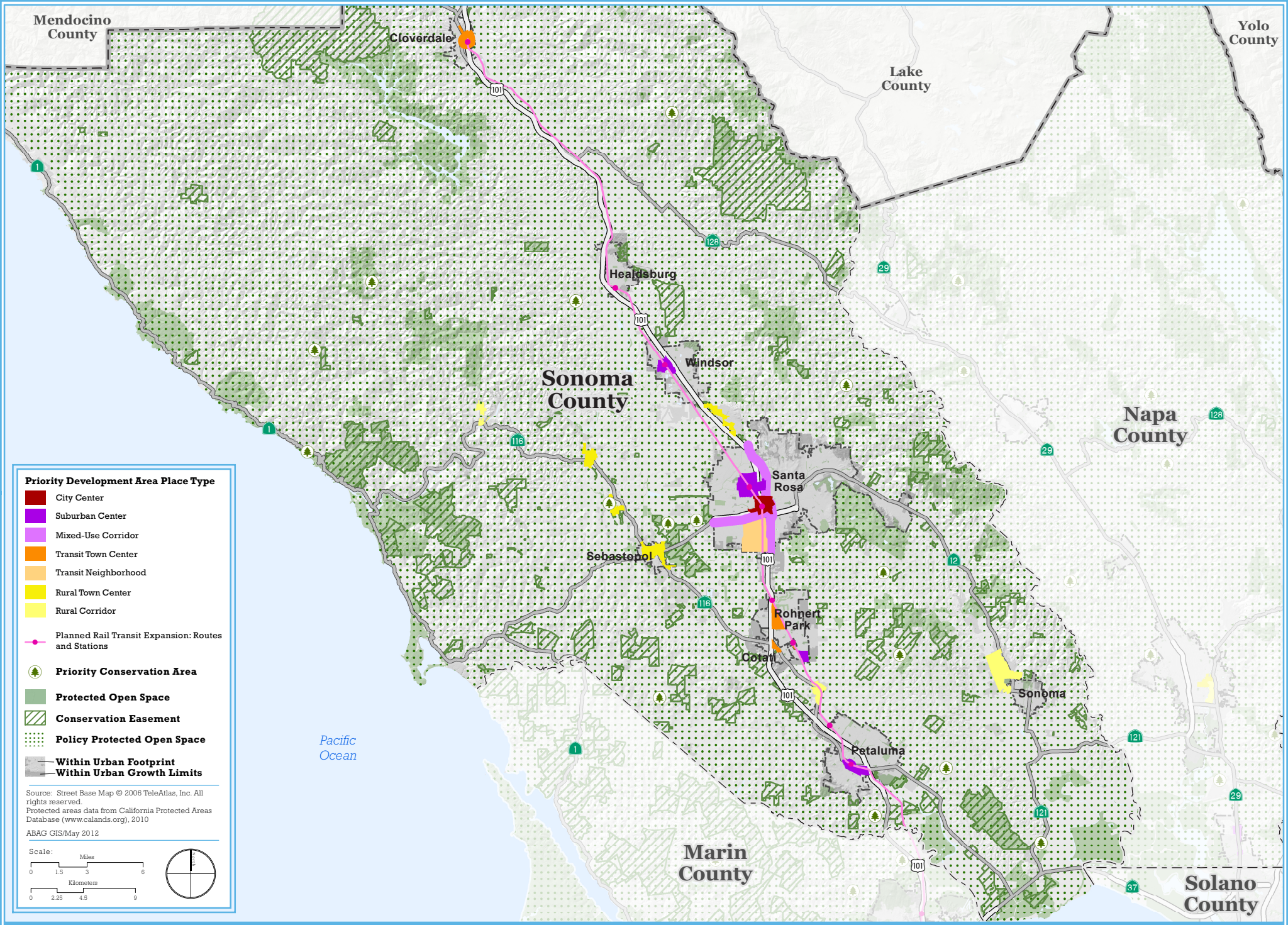
Employed Residents per Job

This ratio is influenced by levels of in-commuting and out-commuting as well as the number of employed residents holding multiple jobs. We have assumed that this ratio holds at the 2010 level, implying the rates of net-incommuting and multiple job-holding remain constant. This implies a small increase in incommuting and multiple job-holding from 2010 proportionate to the increase in total jobs in the region, but halts the trend of increasing rates of incommuting into the region seen in recent decades, due to road capacity constraints and additional housing production supports within the region. This also keeps the incommute well below 2000 levels.

Jobs

Total potential jobs in the Bay Area are provided by Center for Continuing Study of the California Economy, based on an analysis of the Bay Area's share of national jobs by job sector and the region's competitiveness in these sectors. The forecast jobs are calculated from employed residents, holding the 2010 employed resident per job ratio of 0.966 constant. This assumption holds the rates of net in-commuting and multiple job holding constant into the future, as opposed to the increases experienced in the 80's and 90's. The resulting forecast jobs are about 100,000 jobs lower than the potential jobs in the economic forecast from the Center for Continuing Study of the California Economy.

Appendix C: Maps of Priority Development Areas by County

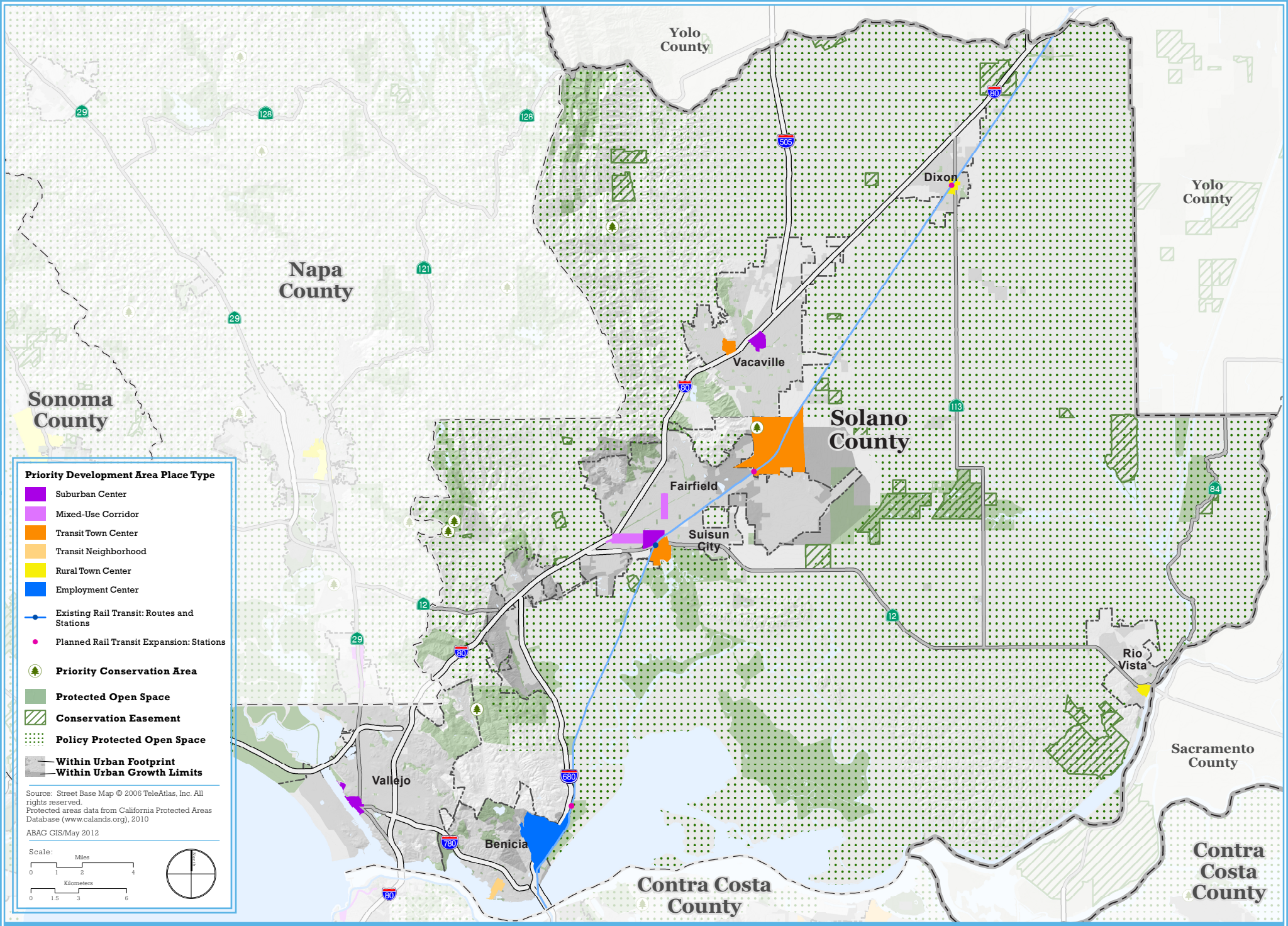


OneBayArea

Place Type for Priority Development Areas in Sonoma County

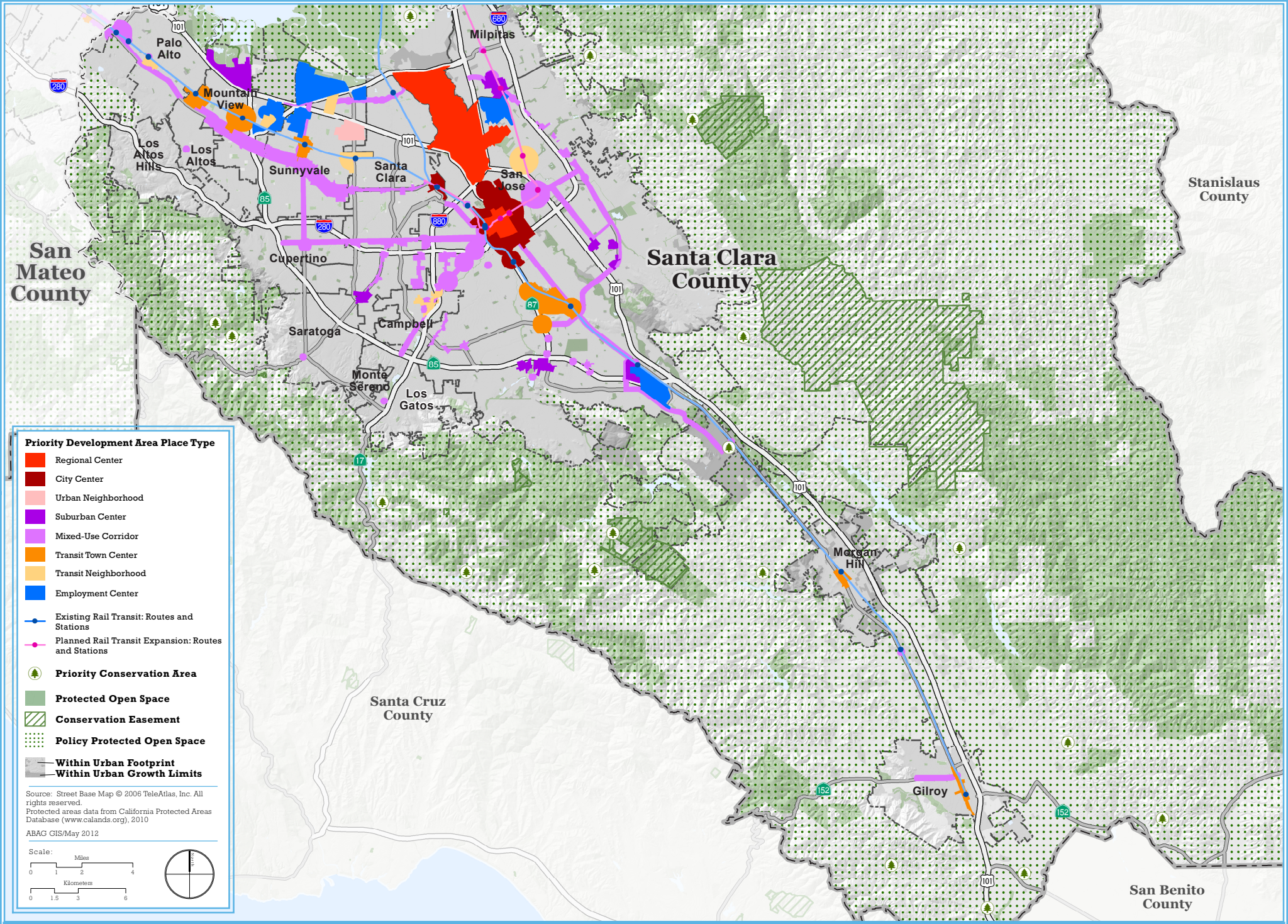
Metropolitan Transportation Commission

ABAG



OneBayArea

Place Type for Priority Development Areas in Solano County

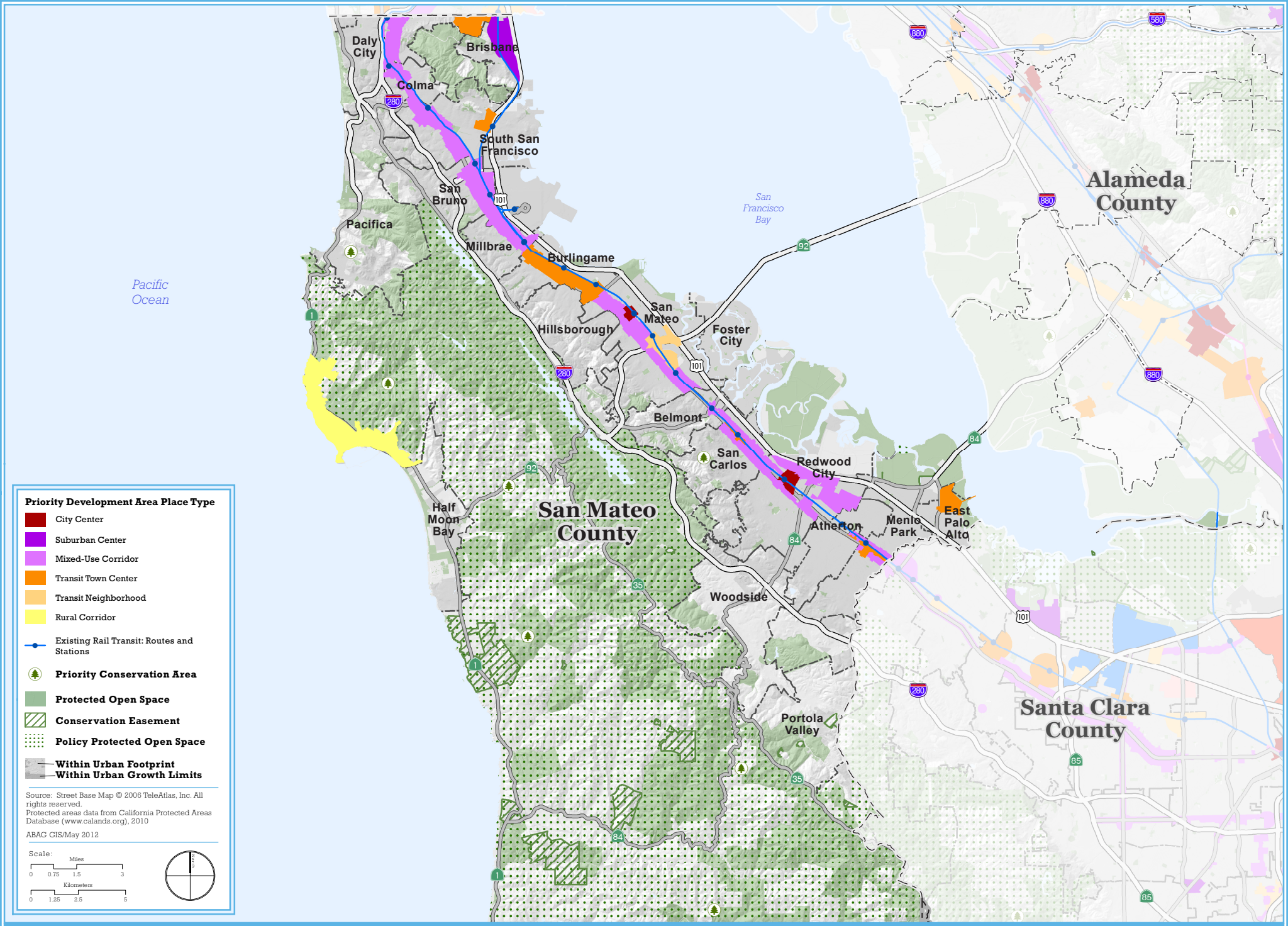


OneBayArea

Place Type for Priority Development Areas in Santa Clara County

METROPOLITAN TRANSPORTATION COMMISSION

ABAG

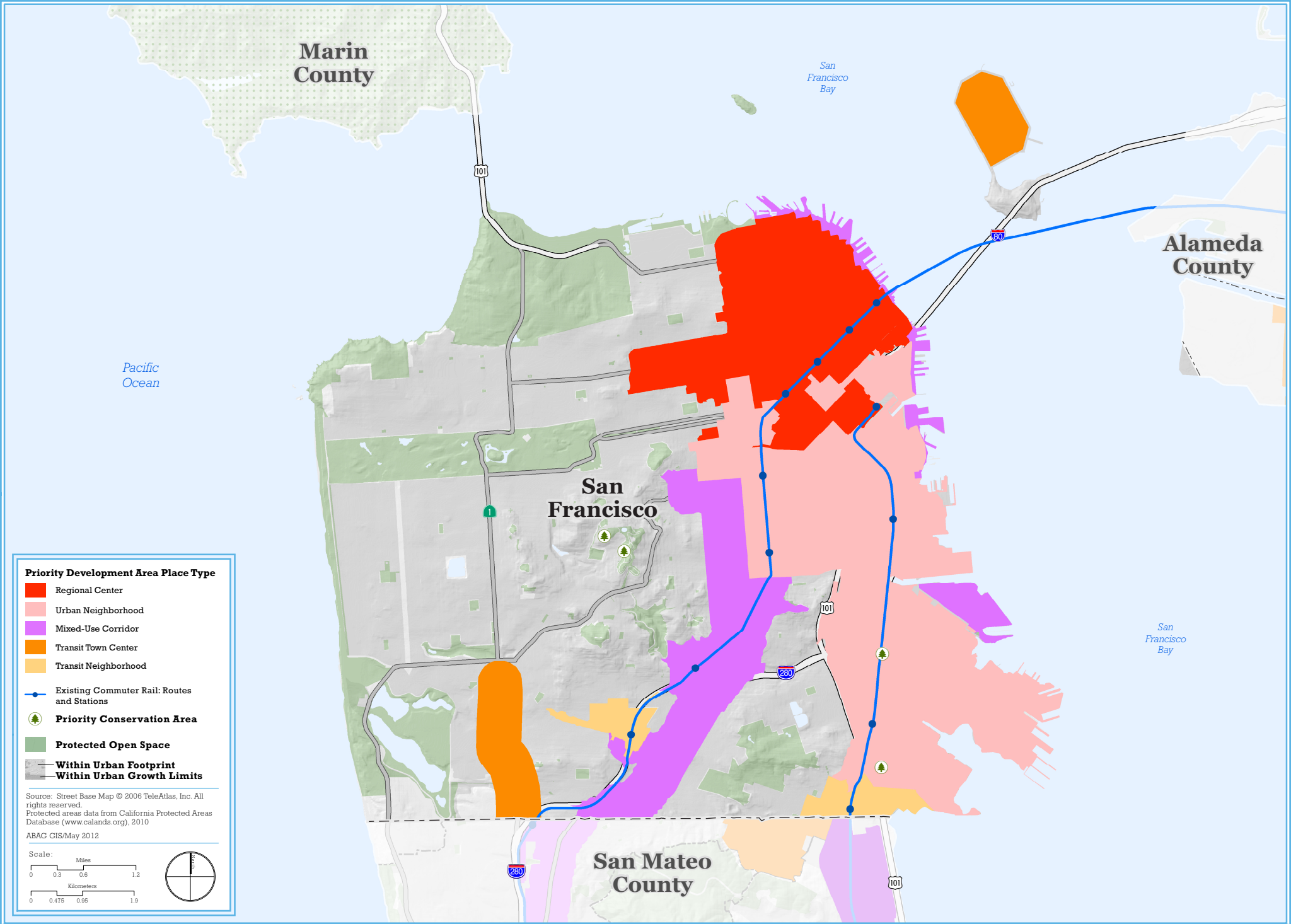


OneBayArea

Place Type for Priority Development Areas in San Mateo County

METROPOLITAN TRANSPORTATION COMMISSION

ABAG

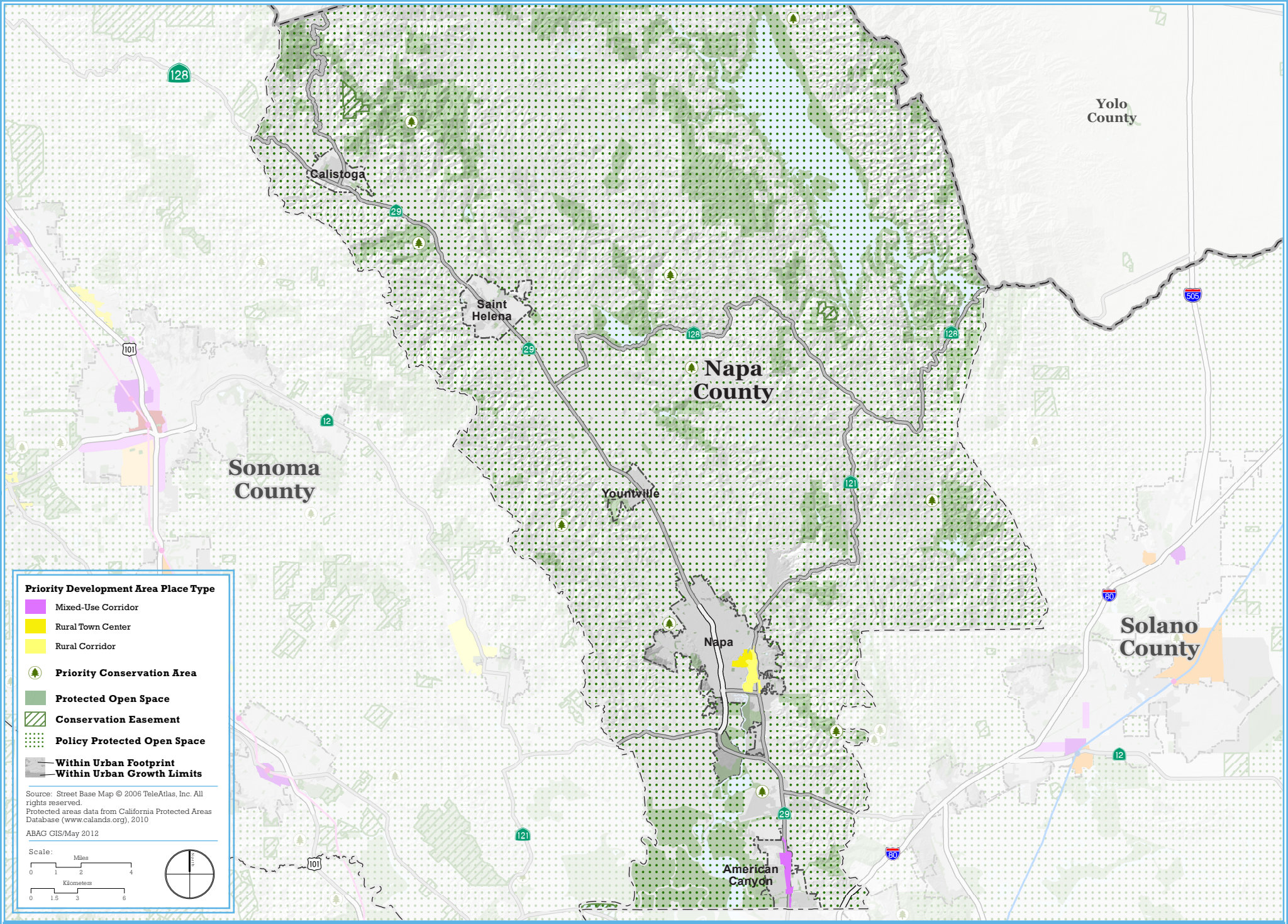


OneBayArea

Place Type for Priority Development Areas in San Francisco

METROPOLITAN TRANSPORTATION COMMISSION

ABAG

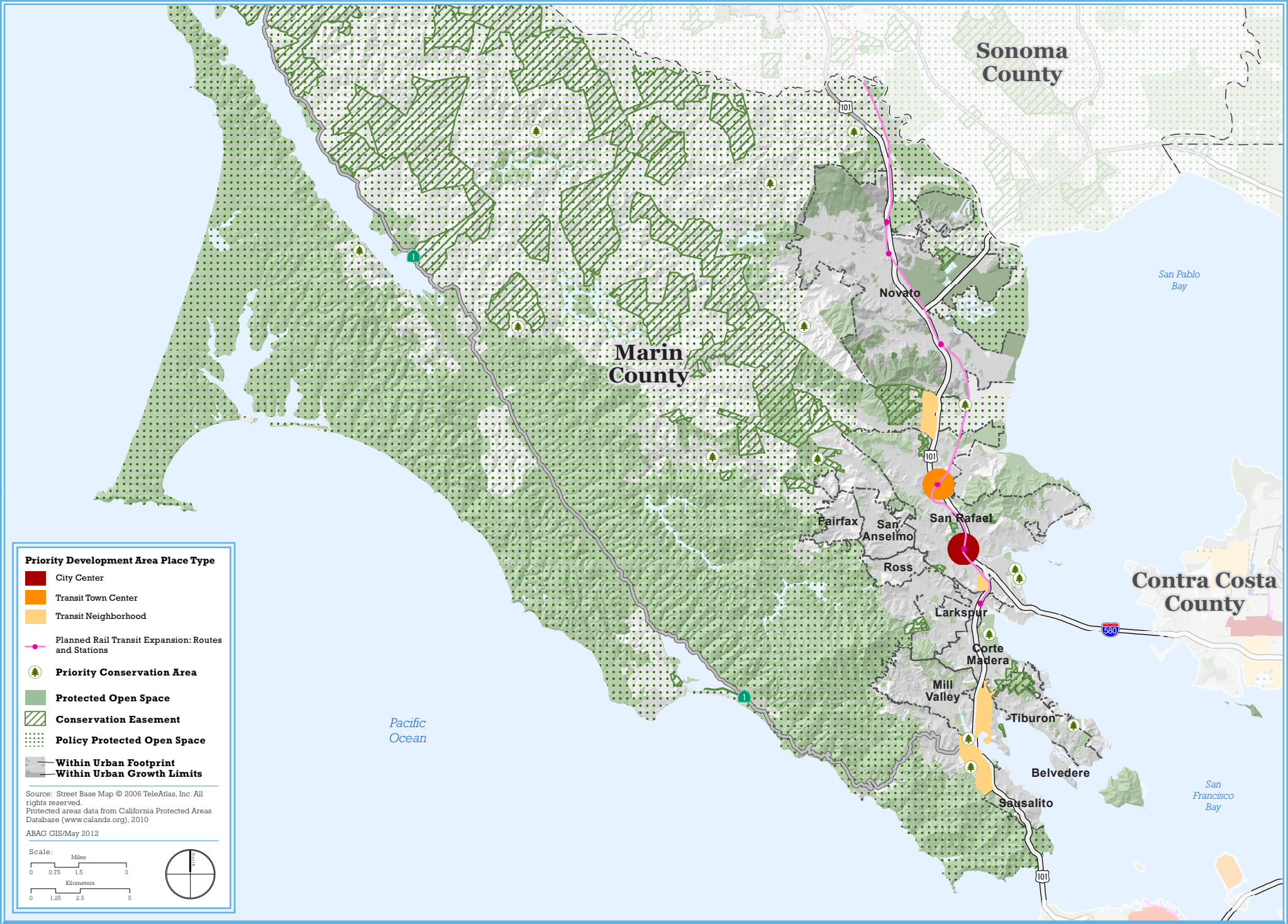


OneBayArea

Place Type for Priority Development Areas in Napa County

METROPOLITAN TRANSPORTATION COMMISSION

ABAG

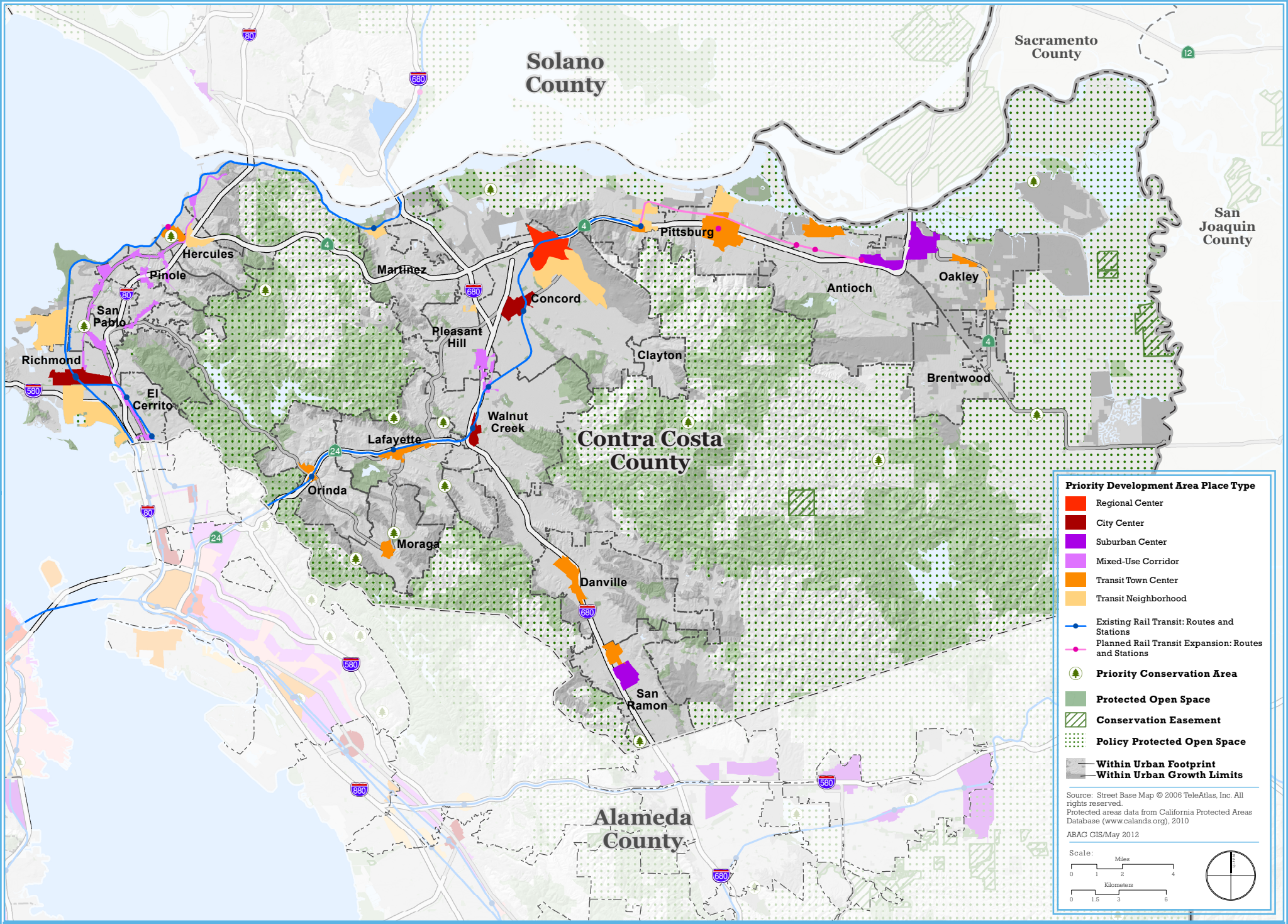


OneBayArea

Place Type for Priority Development Areas in Marin County

METROPOLITAN TRANSPORTATION COMMISSION

ABAG

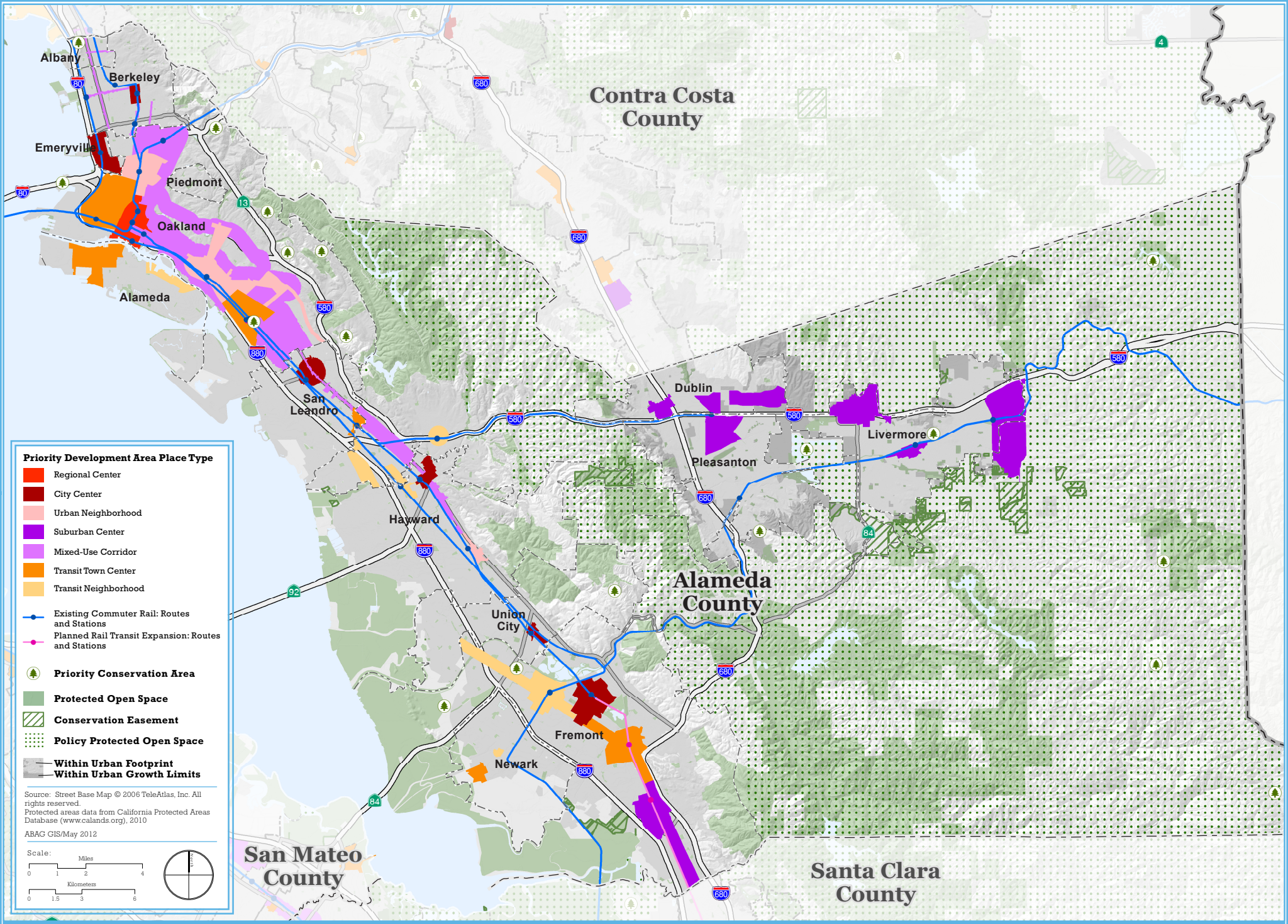


OneBayArea

Place Type for Priority Development Areas in Contra Costa County

METROPOLITAN TRANSPORTATION COMMISSION

ABAG



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Place Type for Priority Development Areas in Alameda County

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Appendix D: Additional Conditions that Could Impact the U.S. Housing Market

Lingering effects of the housing bubble

The sub-prime mortgage crisis and the end of the housing bubble may have long-term repercussions for housing finance and affordability. The relative shortage of new demand (created by the vacuum of Generation X) to offset the increasing quantity of households leaving the housing market (created by seniors trying to sell their homes) could lead to an oversupply of large lot homes for sale.

Tightening credit standards affects homeownership

The impacts of the housing bubble also include the increased standards for mortgage lending, as mentioned earlier. With lenders requiring larger down payments and higher credit scores, many prospective homebuyers may no longer qualify to purchase homes, and hence the reason for the decline in the percentage of homeownership since 2004 cited earlier.

Lower median household incomes than a decade ago

Median household incomes for all age groups in each income category are likely to have ended the decade lower than where they began in 2000. According to Harvard University's analysis of Census Current Population Survey (CPS) data as last measured in March 2009, no group was spared from income declines. If incomes do not rebound quickly, Americans will have to consider whether to cut back on the size and features of their homes or allocate larger shares of their incomes to housing.

Energy costs

Climate change, fuel prices, and policies on climate change and energy all could have an impact on housing types. Future higher energy costs could act to reduce the preferred housing unit size and encourage more central locations that reduce the cost of transportation.

Homeownership may decline

The U.S. homeownership rate dropped to 66.9 percent (down 2.3 percent) since 2004, and continues to drop. Prudential Real Estate Investors project that by 2015 the homeownership rate will drop to 64 percent. Other factors affecting single-family home ownership rates include:

- **Changing rates of marriage**: Americans, especially those in Generation Y, are taking longer to marry, if they marry at all. The median age of first marriage is increasing. In 1970, the median age for a man was 23 and 21 for a woman; today those are 28 and 26, respectively. According to the Council on Contemporary Families, a Chicago-based research firm, for the first time in more than a century, more than half of those aged 25 to 34 have never been married. This trend is more pronounced among young adults with college educations that the Bay Area attracts. This will likely increase the demand for multifamily rentals in the future.

- **Changes in household size and composition:** the typical household is no longer a married couple with children. Less than a quarter of U.S. households in 2010 fit that description. Instead, the single-person household and couples without children will grow at an even faster rate in the future (Joint Center for Housing Studies). University of Southern California Professor Dowell Myers notes that the rapid rise in one-person households will likely continue for the next several decades. In 2000, 25.7 percent of all U.S. households were one-person households. Projections for 2030 indicate that single person households may grow to 33.8 percent, and up to 37.3 percent by 2050. In today's terms, each one percent represents 1.3 million U.S. households.

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Appendix F: Glossary of Terms

Alternative Planning Strategy (APS) — If the SCS is unable to achieve the greenhouse gas reduction target, then an APS must be prepared. The APS would show how the greenhouse gas targets would be achieved through alternative development patterns, infrastructure investments, or additional transportation measures or policies. The APS is a separate document from the Regional Transportation Plan (RTP), but may be adopted at the same time as the RTP.

Alternative Scenarios — A planning scenario for the SCS and RTP. Following development of the Initial Vision Scenario, Alternative Scenarios that were financially constrained (accounted for available revenues) were developed, analyzed and discussed as part of the Plan Bay Area process. (See also Initial Vision Scenario and Preferred Scenario.)

Assembly Bill (AB) 32 — The Global Warming Solutions Act of 2006, which requires California to reduce its greenhouse gas emissions to 1990 levels by 2020.

Assembly Bill (AB) 32 Scoping Plan — The scoping plan developed by the California Air Resources Board (CARB) has a range of greenhouse gas (GHG) emissions reduction actions which include direct regulations, alternative compliance mechanisms, monetary and non-monetary incentives, voluntary actions, market-based mechanisms (such as a cap-and-trade system), and an AB 32 cost of implementation fee regulation to fund the program. The plan is a central requirement of AB 32.

Association of Bay Area Governments (ABAG) — The council of governments and designated regional planning agency represent the San Francisco Bay Area's nine counties and 101 cities and towns. ABAG initiates innovative programs, projects, and partnerships to help resolve the region's economic, social, and environmental challenges, providing research and analysis and cost-effective local government service programs. ABAG is committed to enhancing the quality of life in the Bay Area by leading the region in advocacy, collaboration, and excellence in planning, research, and member services.

Bay Area Air Quality Management District (BAAQMD) — BAAQMD regulates industry and employers to keep air pollution in check and sponsors programs to clean the air. BAAQMD also works with ABAG, the Metropolitan Transportation Commission (MTC), and the Bay Conservation and Development Commission (BCDC) on issues that affect land use, transportation, and air quality.

Bay Area Regional Agency Climate Protection Program — This program was approved by the Joint Policy Committee (JPC) on July 20, 2007. As part of this process, ABAG established targets for assessing alternative land use scenarios in the development of the latest iteration of *Projections 2009,* the region's policy-based forecast of population and employment. MTC developed the RTP update, *Transportation 2035,* which evaluates transportation strategies and investment programs relative to a target of reducing GHG emissions from on-road vehicles in the year 2035 by 40 percent compared to 1990 levels.

Bay Conservation and Development Commission (BCDC) — A state-established agency with jurisdiction over dredging and filling of San Francisco Bay and limited jurisdiction over development within 100 feet of the Bay.

California Air Resources Board (CARB) — part of the California Environmental Protection Agency. Its mission is to promote and protect public health, welfare, and ecological resources through the effective and efficient reduction of air pollutants while recognizing and considering the effects on the economy of the state. SB 375 requires that CARB set GHG-reduction targets for cars and light trucks in each California region for the years 2020 and 2035.

California Environmental Quality Act (CEQA) — This California law passed in 1970 requires that documentation of potential environmental impacts of development projects must be submitted prior to development. Under SB 375, housing development projects can qualify for a full CEQA exemption if:

- They do not exceed 8 acres or 200 units
- They can be served by existing utilities
- They will not have a significant effect on historic resources
- Their buildings exceed energy efficiency standards
- They provide any of the following:
  - 5 acres of open space
  - 20 percent moderate income housing
  - 10 percent low income housing
  - 5 percent very low income housing.

Carbon Dioxide (CO_2) — CO_2 is a colorless, odorless, non-poisonous gas that is a normal part of the ambient air. CO_2 contributes the most to human-induced global warming. Human activities such as fossil fuel combustion and deforestation have increased atmospheric concentrations of CO_2 by approximately 30 percent since the industrial revolution.

Clean Air Plan (CAP) — At a public hearing on September 15, 2010, the BAAQMD Board of Directors adopted the final *Bay Area 2010 Clean Air Plan*, and certified the Final Environmental Impact Report on the CAP. The 2010 CAP serves to update the Bay Area ozone plan in compliance with the requirements of Chapter 10 of the California Health & Safety Code. In addition, the 2010 CAP provides an integrated, multi-pollutant strategy to improve air quality, protect public health, and protect the climate.

Climate Change — Climate change refers to changes in the Earth's weather patterns, including the rise in the Earth's average temperature due to an increase in heat-trapping or greenhouse gases (GHGs) in the atmosphere. Climate scientists agree that climate change is a man-made problem caused by the burning of fossil fuels like petroleum and coal. Transportation accounts for about 40 percent of the Bay Area's GHG emissions. Climate change is expected to significantly affect the Bay Area's public health, air quality, and transportation infrastructure through sea level rise and extreme weather events.

Complete Communities — Complete communities are those which provide the opportunity for people to live a complete day, including their work, school, services, and recreation, within the boundaries of their own neighborhoods. Complete communities offer these amenities in a pedestrian-friendly atmosphere where public transit is at least as convenient as the automobile. These neighborhoods or districts are self-sufficient by connecting transit and shopping, and are

surrounded by different housing types, services, and amenities. Complete communities are created through an integrated approach to transportation planning, land use planning, and urban design with an inter-related set of policies that mutually reinforce one another.

Equitable Development — Equitable development ensures that individuals and families in all communities can participate in and benefit from economic growth and activity. It is grounded in four guiding principles: the integration of people and place strategies; reduction of local and regional disparities; promotion of "double bottom line" investments; and inclusion of meaningful community voice, participation, and leadership.

FOCUS — A regional planning initiative spearheaded by ABAG in cooperation with MTC, and in coordination with BAAQMD and BCDC. FOCUS seeks to protect open space and natural resources while encouraging infill development in existing communities (see PCAs and PDAs below). The FOCUS initiative encourages future growth in areas near transit and within the communities that surround the San Francisco Bay. Concentrating housing in these areas offers housing and transportation choices for all residents, while helping to reduce traffic, protect the environment, and enhance existing neighborhoods.

Focused Growth — Development that reflects higher densities, mixed use, and a higher proportion of housing and employment growth in urban areas, particularly near transit stations and along transit corridors, as well as in town centers.

Global Warming — The progressive gradual rise of the Earth's average surface temperature thought to be caused in part by increased concentrations of GHGs in the atmosphere.

Greenhouse gas (GHG) — Gas in an atmosphere that absorbs and emits radiation within the thermal infrared range. This process is the fundamental cause of the greenhouse effect, which causes warming of the atmosphere of the Earth.

Initial Vision Scenario — A planning scenario for the SCS and RTP**.** The Initial Vision Scenario was developed in 2011 to serve as a starting point for articulating the Bay Area's vision of future land uses and for assessing performance relative to statutory greenhouse gas and housing targets as well as other voluntary performance targets. The Initial Vision Scenario was unconstrained by available revenues. It served as the basis for the development, analysis and discussion of the Alternative Scenarios that led to the Jobs-Housing Connection Strategy. (See also Alternative Scenarios and Preferred Scenario.)

Joint Policy Committee (JPC) — The JPC coordinates the regional planning efforts of the ABAG, BAAQMD, BCDC and MTC. Among the JPC's current initiatives are focused growth, climate protection, and development of a sustainable communities' strategy pursuant to SB 375.

Low-carbon emissions standards or low carbon fuel standards (LCFS) — California's LCFS requires fuel providers to reduce the carbon intensity of transportation fuels sold in the state, dramatically expanding the market for alternative fuels. By 2020, the LCFS will reduce carbon content in all passenger vehicle fuels sold in California by 10 percent.

Metropolitan Planning Organization (MPO) **—** A regional council of governments authorized under federal law to develop a regional transportation plan.

Metropolitan Transportation Commission (MTC) — The transportation planning, financing and coordinating agency for the nine-county San Francisco Bay Area. MTC is the MPO for the Bay Area. MTC is currently working on its 2035 Transportation Plan.

Particulate Matter$_{2.5}$ ($PM_{2.5}$) — Fine particles are 2.5 micrometers in diameter and smaller. The regional target is to reduce fine particulate matter, $PM_{2.5}$, by 10 percent below today's levels.

Particulate Matter $_{10}$ (PM_{10}) — Particulate matter of 10 micrometers or less in size. The regional target is to reduce coarse particulate matter, PM_{10}, by 45 percent over today's levels.

Performance Measures — Indicators of how well the transportation system or specific transportation projects will improve transportation conditions.

Place Types — Groups neighborhoods or centers with similar sustainability characteristics and physical and social qualities, such as the scale of housing buildings, frequency and type of transit, quality of the streets, concentration of jobs, and range of services. Place types are a tool of local-regional exchange to identify places and policies for sustainable development. Bay Area jurisdictions can select a place type to indicate their desired level of growth in the Sustainable Communities Strategy.

Plan Bay Area — One of our region's most comprehensive planning efforts to date. It is a joint effort led by ABAG and MTC in partnership with BAAQMD and BCDC. All four agencies are collaborating at an unprecedented level to produce a more integrated land use-transportation plan.

Preferred Scenario - A planning scenario for the SCS and RTP that articulates the Bay Area's vision of future land uses and transportation investments, against which performance relative to statutory greenhouse gas and other voluntary performance targets are measured. Consideration of the Initial Vision Scenario and Alternative Scenarios led to the Jobs-Housing Connection Strategy, released in May of 2012. The preferred scenario will be evaluated against alternatives to the preferred scenario, including a 'no project' alternative as part of the environmental review process. Final adoption of the SCS and RTP by ABAG and MTC will occur in 2013. (See also Alternative Scenarios and Initial Vision Scenario.)

Priority Conservation Area (PCA) — Regionally significant open spaces for which there exists a broad consensus for long-term protection and for which public funds may be invested to promote their protection. Local jurisdictions and open space agencies identified these locations voluntarily through the FOCUS initiative.

Priority Development Area (PDA) — Locations within existing communities that present infill development opportunities, and are easily accessible to transit, jobs, shopping and services. Local jurisdictions identified these locations voluntarily through the FOCUS initiative.

Reduction Target — A goal set by California Air Resources Board for a region to reduce the amount of greenhouse gas emissions from cars and light trucks within a specific timeframe.

RAWG (Regional Advisory Working Group) — An advisory group set up to advise staff of ABAG, MTC, BAAQMD and BCDC on development of Plan Bay Area. Its membership includes staff representatives of local jurisdictions (CMAs, planning directors, transit operators, public works agencies) as well as representatives from the business, housing, environmental and social-justice communities.

Regional Housing Needs Assessment (RHNA) — The Regional Housing Needs Assessment process is a state mandated planning process for housing in California. ABAG is responsible for allocating this state-determined regional housing need among all of the Bay Area's nine counties and 101 cities with assistance of a recently established SCS Housing Methodology Committee. The SCS Housing Methodology Committee is currently evaluating the factors to be used by ABAG in the current allocation process. Beginning in this current cycle, RHNAs must be consistent with the Sustainable Communities Strategy (SCS) mandated by SB 375. Local housing elements must be adopted 18 months after the next regional transportation plan.

RHNA Integration — RHNA must be consistent with the Sustainable Communities Strategy (SCS). SB 375 requires that the RHNA/housing element cycle will be synchronized and coordinated with the preparation of every other RTP update, starting with the first update after 2010 (i.e., 2013). RTP updates occur every four years, and housing elements must be adopted by local governments eighteen months after the adoption of the RTP. With a few exceptions, the region will now be on an eight-year RHNA cycle and local governments will be on eight-year housing element cycles. In addition to synchronizing with the preparation of the RTP and the SCS, the RHNA allocation must be consistent with the development pattern included in the SCS. The resolution approving the RHNA shall demonstrate consistency with the Bay Area's implementation of SB 375 and the SCS.

Regional Performance Targets — Both ABAG and MTC used performance targets in developing the *Regional Transportation Plan* and *Projections 2009*. Performance targets include limiting greenfield development to 900 acres per year, or 22,500 acres over the 2010-2035 time period. Additional targets include increasing non-auto access to jobs and services by 20 percent, by 2035, and reducing daily vehicle miles traveled (VMT) per capita by 10 percent, compared to 2006 levels. Other targets include increasing access to jobs and essential services via transit or walking by 20 percent above today's levels; reducing driving per person by 10 percent below today's levels; reducing traffic congestion, measured by hours of delay, by 20 percent below today's levels; and reducing carbon dioxide emissions by 40 percent below 1990 levels.

Regional Transportation Plan (RTP) — A transportation plan which is developed every four or five years that, among other things, outlines a region's transportation investments. The Bay Area's Regional Transportation Plan is called *Transportation 2035 Plan* and it is the long-range planning document of the Metropolitan Transportation Commission (MTC). The plan has a 25-year horizon and serves as a comprehensive blueprint for investment strategies for maintaining, managing and improving the surface transportation network in the nine-county San Francisco Bay Area. The plan determines how the region will spend nearly $218 billion in local, regional, state and federal funds that are projected to be available to the Bay Area over the next 25 years.

SB 375 Transportation and Land Use Planning Act of 2008 — The act mandates an integrated regional land-use-and-transportation-planning approach to reducing greenhouse-gas (GHG) emissions from automobiles and light trucks, principally by reducing vehicle miles traveled (VMT). SB 375 requires that the California Air Resources Board (CARB) set GHG-reduction targets for cars

and light trucks in each California region for the years 2020 and 2035. SB 375 provides incentives for creating attractive, walkable and sustainable communities and revitalizing existing communities. SB 375 also changes the state Housing Element law by linking regional planning efforts for transportation and housing. Under the bill, all transportation and housing planning processes are put on the same eight-year schedule and must be updated once every eight years. The Sustainable Communities Strategy, RTP and RHNA will be developed together through a single and integrated cross agency work program with the JPC.

SB 375 Implementation — SB 375 explicitly assigns responsibilities to ABAG and to the MTC to implement the bill's provisions for the Bay Area. Both agencies are members of the Joint Policy Committee (JPC). The polices in this document were approved by the JPC and provide guidance to the two lead regional agencies in fulfilling their responsibilities in collaboration with their JPC partners, BAAQMD and BCDC.

Sustainable Communities Strategy (SCS) — A part of the Regional Transportation Plan that predicts a likely growth pattern for the region. The SCS lays out how emissions reductions will be met. This strategy becomes part of the Regional Transportation Plan. It does incorporate the RHNA requirement to provide housing to accommodate all income groups while meeting reduction targets. SB 375 requires the regional transportation plan for regions of the state with a metropolitan transportation planning organization to adopt an SCS.

Sustainable Communities Environmental Assessment (SCEA) — The Sustainable Communities Environmental Assessment (SCEA) is the CEQA document that will be prepared to review 'transit priority projects' that are consistent with the adopted Sustainable Communities Strategy. The SCEA is not required to reference, describe, or discuss growth inducing impacts or any project-specific or cumulative impacts from cars and light-duty truck trips generated by the project on global warming or the regional transportation network. The lead agency's decision to review and approve a transit priority project with the SCEA shall be reviewed under the substantial evidence standard.

Transit-Oriented Development (TOD) — A type of development that links land use and transportation facilities to support public transit systems and help reduce sprawl, traffic congestion and air pollution. Transit-oriented developments include housing, along with complementary public uses (jobs, retail and services), at a strategic point along a regional transit system, such as a rail hub.

Transportation for Livable Communities (TLC) — MTC's TLC Program provides funding for projects that provide for a range of transportation choices, support connectivity between transportation investments and land uses, and are developed through an inclusive community planning effort. The purpose of TLC Program is to support community-based transportation projects that bring new vibrancy to downtown areas, commercial cores, neighborhoods, and transit corridors, enhancing their amenities and ambiance and making them places where people want to live, work and visit.

Transit Priority Projects — Projects that contain at least 50 percent residential use; have a minimum net density of 20 units per acre; have a floor-area ratio for the commercial portion of the project at 0.75; and are located within ½ mile of either a rail stop, a ferry terminal, or a bus line with 15-minute headways.