

*The Economics of Land Use*



## Report

# PDA Assessment Update

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Metropolitan Transportation Commission

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# 1. REPORT SUMMARY AND FINDINGS

## Plan Bay Area Background

In 2013, the Metropolitan Transportation Commission (MTC) and the Association of Bay Area Governments (ABAG) adopted *Plan Bay Area*, the first integrated long-range transportation and land-use/housing plan for the San Francisco Bay Area that addresses the challenge of accommodating projected growth. The Plan integrates transportation and land use to better align jobs and housing with the region's transportation network and to reduce greenhouse gas emissions. The Plan distributes growth to areas with greater accessibility to transit, job centers, shopping, schools, recreation, and other amenities, while planning for environments that better support walking and biking.

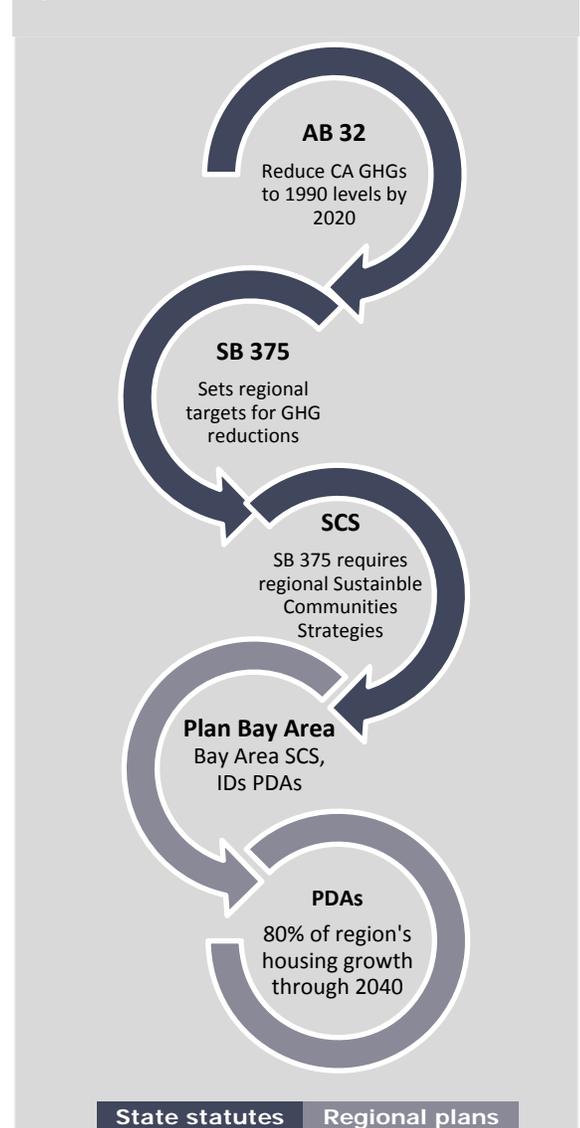
*Plan Bay Area* projects that the San Francisco Bay Area will grow by over 2 million people, 1 million jobs, and 660,000 housing units between 2010 and 2040. Much of this growth is anticipated to be located in Priority Development Areas (PDAs), or designated areas identified by local jurisdictions to be appropriate for residential and commercial development. Approximately 80 percent of the anticipated housing growth for *Plan Bay Area* is allocated to PDAs.

As MTC and ABAG prepare to update the initial *Plan Bay Area*, this report is intended to provide a deeper understanding and independent assessment of the readiness and feasibility of PDAs to accommodate the number of housing units envisioned by *Plan Bay Area*. By understanding the challenges to development across a diverse range of PDAs with varying conditions, regional efforts for funding, policy, and advocacy can be focused in areas that need it most. *Plan Bay Area* also outlined strategies and initial legislative changes needed to support the proposed pattern of growth. This current study similarly identifies steps that may be productive in realizing the objectives of *Plan Bay Area*.

## PDA Readiness Assessment Methodology

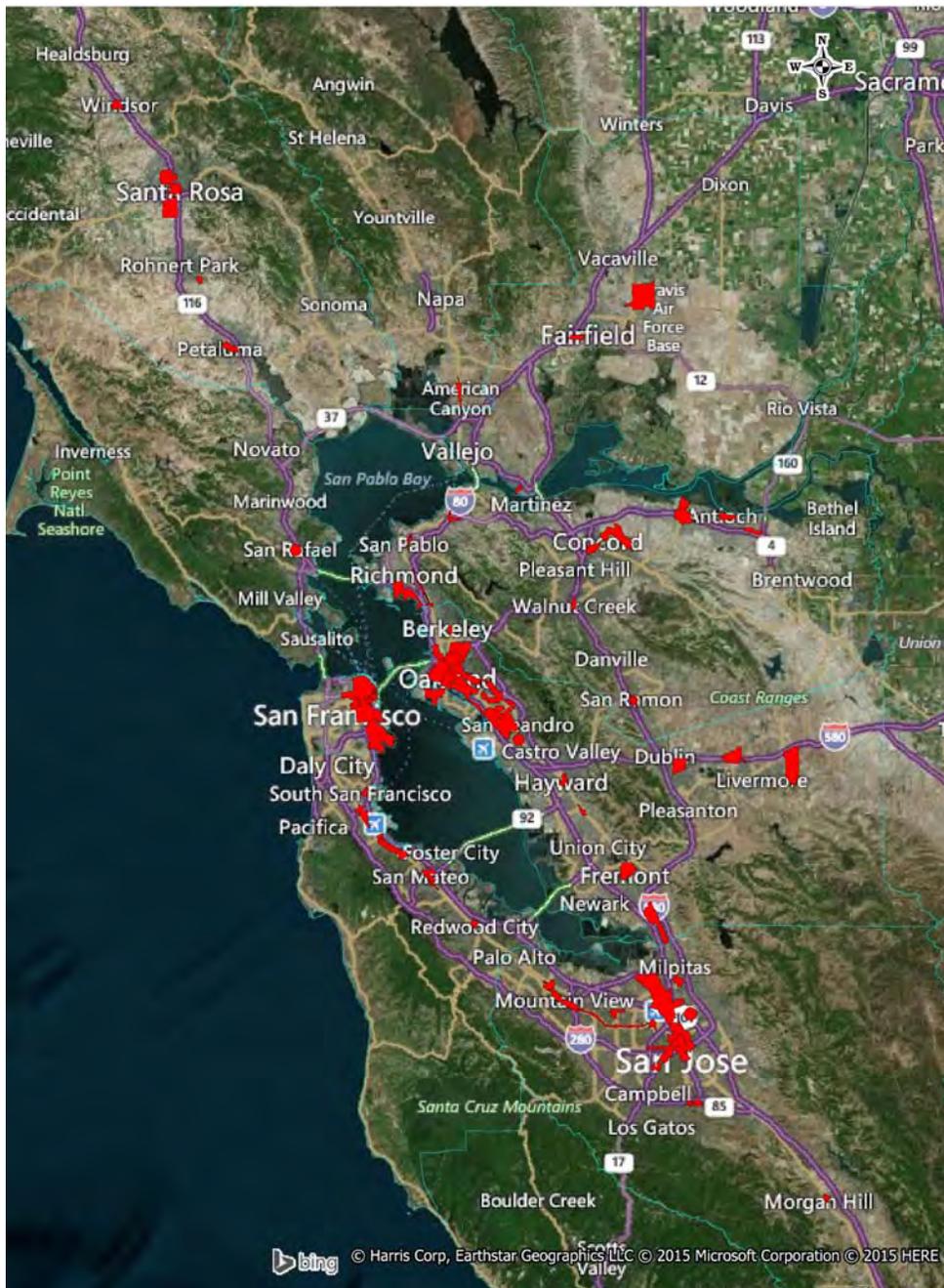
In 2014, MTC commissioned the urban economics consulting firm Economic & Planning Systems (EPS) and its sub consultant Community Design + Architecture (CD+A) to conduct an assessment of the PDAs' "readiness" to accommodate the housing growth forecasts included in *Plan Bay Area*. Building upon the initial development readiness assessment conducted by EPS

Figure 1 PDAs Links to State Law



and CD+A in 2012/2013 of 20 representative PDAs (prior to adoption of *Plan Bay Area*), this PDA Assessment Update provides in-depth analysis on a sample of 65 representative PDAs (see **Figure 2**). The analysis incorporates information gleaned from discussions with local jurisdiction staff, examination of existing local plans and policies, market and demographic data, and interviews with developers working in the sample PDAs. In addition, a Technical Advisory Committee was assembled, consisting of representatives from the Building Industry Association, regionally active housing developers, cities, and congestion management agencies to review interim findings and make suggestions for methodological approaches and key considerations and recommendations based on their experiences.

**Figure 2 Map of 65 PDAs Selected for Assessment Update**



The first step of the process was to select a sample of PDAs to evaluate. While the 2012-2013 assessment focused on a sample of 20 PDAs, this update includes 65 PDAs – including the 20 PDAs included in the earlier study – that jointly are allocated more than half of all units forecast for the region and roughly 2/3 of all units allocated to PDAs in *Plan Bay Area*. The sample includes PDAs in all nine Bay Area counties and in nearly 40 cities, including each of the 16 cities projected to receive the most units under *Plan Bay Area*. The sample also includes examples from all PDA categories, ranging from “Regional Centers” like Downtown San Jose to less dense “Transit Neighborhoods.” As such, the sample is expected to reasonably represent the conditions and expectations in the totality of the *Plan Bay Area* PDAs, and the readiness assessment results may be extrapolated to the Plan overall.

The PDA Assessment Update estimates the ability of the PDAs in the sample to accommodate new development consistent with *Plan Bay Area* housing forecasts. The report estimates the number of housing units that can be produced assuming a “baseline” of current conditions, and the increase in the number of units that could be produced under “amended” conditions if certain key barriers to development can be addressed by policy or financial interventions over the 30-year time horizon of *Plan Bay Area*. For each PDA, EPS and CD+A have evaluated the capacity for housing development based on opportunity sites and local zoning standards, and then evaluated the likelihood of achieving that full potential capacity based on a variety of factors. If circumstances in the PDAs existed that were judged to reduce the possibility of achieving the housing allocation in *Plan Bay Area*, EPS reduced the number of units projected to be achievable according to our judgment of the severity and permanence of those identified constraints. Five broad criteria were used to make this assessment:

#### Readiness Criteria

- 1) **Physical Capacity.** Housing capacity estimate, based on current zoning and developable land.
- 2) **Planning/Entitlement.** Status and characteristics of existing planning documents and the entitlement process.
- 3) **Community Support.** Level of local support for new housing as demonstrated by elected official approval of PDA-supportive projects and policies, as well as history of successful neighborhood opposition.
- 4) **Market and Feasibility.** The pace and character of past and approved housing development, as well as market pricing sufficient to support development types required to meet housing allocation.
- 5) **Infrastructure Needs.** Infrastructure capacity, unfunded needs and financing capability.

## Summary of Findings and Recommendations

**Table 1** provides a summary of the EPS PDA Assessment Update results, indicating the *Plan Bay Area* housing forecast for each PDA in the sample, and the percentage of forecast housing units likely to be accommodated under current “baseline” conditions and under “amended” conditions if recommended policy actions are taken. While EPS did not evaluate every PDA in *Plan Bay Area*, the below sample represents a majority of the forecast housing growth as well as a full spectrum of market, physical, and planning conditions across all geographic place types in the Bay Area. As such, we believe the findings of this analysis can be extrapolated reasonably to reflect the expectations for the entire set of PDAs in *Plan Bay Area*.

**Table 1 Summary of PDA Readiness Assessment Results (page 1 of 3)**

No.	PDA Name	Plan Bay Area Allocated Units	Capacity Units	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
				Number	% of Total Allocation		Number	% of Total Allocation	
1	Alameda: Naval Air Station	4,010	1,935	1,838	46%	Community-driven density limits due to congestion concerns	2,903	72%	Increased zoning capacity and external infrastructure funding
2	American Canyon: Highway 29 Corridor	1,540	1,027	755	49%	Modest pricing and infrastructure needs	1,156	75%	Increased capacity and infrastructure resources
3	Antioch: Hillcrest eBART Station	2,290	2,500	1,000	44%	Infrastructure needs, modest pricing, and limited market for multifamily product	1,375	60%	External infrastructure funding or EIFD
4	Antioch: Rivertown Waterfront	1,830	2,204	882	48%	Modest pricing and limited market for multifamily product	1,212	66%	Parcel assembly tools and external infrastructure funding
5	Benicia: Downtown	930	704	246	26%	Modest pricing and limited site capacity	246	26%	No amendments proposed
6	Berkeley: Downtown	4,150	3,100	2,480	60%	Community opposition and infill parcelization	3,069	74%	Successful development opposition lessens
7	Burlingame: Burlingame El Camino Real	3,260	1,060	954	29%	Infill parcelization and single-family adjacency to El Camino limit taller development	1,007	31%	Parcel assembly tools available
8	Concord: Community Reuse Area/Los Medanos	12,202	17,680	8,840	72%	Modest pricing, comprehensive infrastructure needs, faster absorption required than historically achieved	9,724	80%	Infrastructure resources available
9	Concord: Downtown	3,140	10,227	4,091	130%	Feasibility issues at podium development types and infill parcelization	4,091	130%	No amendments proposed
10	El Cerrito: San Pablo Avenue Corridor	1,020	3,121	1,404	138%	Infill parcelization, value of existing uses	1,717	168%	Parcel redevelopment, circulation improvements, and outside funding
11	Emeryville: Mixed-Use Core	5,470	6,461	4,523	83%	Community opposition and infill parcelization	5,492	100%	Parcel assembly tools and lessened development opposition
12	Fairfield: Fairfield-Vacaville Train Station	6,050	8,715	5,665	94%	Modest pricing and infrastructure needs	6,101	101%	Infrastructure resources available
13	Fairfield: West Texas Street Gateway	2,430	1,820	1,433	59%	Modest pricing and costs to relocate public uses in PDA	1,624	67%	Specific Plan complete and infrastructure resources available
14	Fremont: City Center	2,900	9,842	3,937	136%	Infrastructure needs and school capacity	5,905	204%	External infrastructure funding or EIFD
15	Fremont: Warm Springs	2,980	4,000	2,800	94%	Infrastructure needs and school capacity	3,600	121%	Improve infrastructure financing strategy
16	Hayward: Downtown	3,220	5,159	2,580	80%	Modest pricing and infill parcelization	3,353	104%	Parcel assembly tools and external infrastructure funding
17	Hayward: South Hayward BART	2,700	2,814	1,266	47%	Modest pricing, parcelization, and infrastructure requirements including replacement parking	1,970	73%	External infrastructure funding and removal of design constraint
18	Hercules: Central Hercules	2,440	6,927	2,424	99%	Modest pricing, site conditions and access	3,810	156%	External infrastructure funding
19	Livermore: East Side	4,270	2,000	2,000	47%	No plan in development, institutional (LLNL) dominates a portion of the PDA leaving limited available parcels	2,400	56%	A specific plan is begun and completed
20	Livermore: Isabel Avenue/BART Station Planning Area	3,470	3,500	2,975	86%	Plan not yet in place (in development) and evolving market conditions	3,150	91%	Specific Plan complete, Exempt area from Citywide housing allocation process, BART or other transportation assumed to be in place along with other improvements
21	Millbrae: Transit Station Area	2,420	1,750	1,400	58%	Limited site availability	1,488	61%	Parcel assembly tools available.
22	Milpitas: Transit Area	7,080	7,278	6,550	93%	Infill parcelization and value of existing uses	7,278	103%	Parcel assembly tools available and infrastructure resources available

**Table 1 Summary of PDA Readiness Assessment Results (page 2 of 3)**

No.	PDA Name	Plan Bay Area Allocated Units	Capacity Units	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
				Number	% of Total Allocation		Number	% of Total Allocation	
23	Morgan Hill: Downtown	1,420	1,596	1,037	73%	Market conditions	1,117	79%	Parcel assembly tools available
24	Mountain View: San Antonio	2,760	1,235	1,050	38%	Site availability an capacity	1,235	45%	Parcel assembly tools available
25	Mountain View: El Camino Real	1,960	2,660	2,128	109%	Infill parcelization	2,660	136%	Parcel assembly tools available
26	Oakland: Coliseum BART Station Area	6,850	6,850	2,055	30%	Modest achievable pricing, infrastructure needs, and great uncertainty	3,768	55%	External infrastructure funding
27	Oakland: Downtown & Jack London Square	14,290	18,045	8,120	57%	Site availability and reliance on Type I construction	10,827	76%	Parcel assembly tools and external infrastructure funding
28	Oakland: MacArthur Transit Village	5,090	5,428	2,714	53%	Marginal feasibility and infill parcelization	3,257	64%	Parcel assembly tools
29	Oakland: Transit Oriented Development Corridors	10,130	10,130	5,065	50%	Infill parcelization and modest pricing does not support higher density in many areas	6,585	65%	Parcel assembly tools and external infrastructure funding
30	Oakland: West Oakland	6,870	5,000	3,000	44%	Marginal feasibility and infrastructure upgrades sought	3,500	51%	External infrastructure funding
31	Petaluma: Central, Turning Basin/Lower Reach	1,760	3,944	789	45%	Infrastructure capacity and funding	2,761	157%	External infrastructure financing and improved market conditions
32	Pittsburg: Downtown	1,830	2,064	929	51%	Modest pricing and infill parcelization	1,238	68%	Improve infrastructure financing strategy
33	Pittsburg: Railroad Avenue eBART Station	3,530	4,591	2,296	65%	Modest pricing and infill parcelization	2,755	78%	Parcel assembly tools available and infrastructure financing plan available
34	Pleasanton: Hacienda	3,590	2,266	1,496	42%	Lack of plan and community opposition	1,620	45%	A specific plan is begun and completed; Successful opposition to development lessened
35	Redwood City: Downtown	5,240	5,063	3,544	68%	Infill parcelization	4,557	87%	Parcel assembly tools and external infrastructure funding
36	Richmond: South Richmond	1,380	4,100	2,050	149%	Modest pricing	2,870	208%	Improve infrastructure financing strategy
37	Rohnert Park: Sonoma Mountain Village	2,010	2,010	2,010	100%	Modest pricing	2,010	100%	No amendments proposed
38	San Bruno: Transit Corridors	3,330	1,610	1,151	35%	Limited site availability	1,240	37%	Parcel assembly tools available
39	San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point	10,900	18,826	10,354	95%	Less proven market and infrastructure needs	11,296	104%	External infrastructure funding
40	San Francisco: Downtown-Van Ness-Geary	27,140	25,423	16,525	61%	Site availability, infill parcelization and desired transit capacity increases	24,406	90%	Some increased zoning capacity, parcel assembly tools, and external infrastructure funding
41	San Francisco: Eastern Neighborhoods	11,420	25,786	12,893	113%	Transit capacity increases desired	16,761	147%	Parcel assembly tools and external infrastructure funding
42	San Francisco: Market & Octavia	6,210	6,000	6,270	101%	Infill parcelization	6,900	111%	Some increased zoning capacity and parcel assembly tools
43	San Francisco: Transbay Terminal	4,720	4,541	4,541	96%	No major issues noted	4,541	96%	None
44	San Jose: Berryessa Station	6,110	4,814	4,236	69%	Existing use, infrastructure needs, and market preference for lower density	5,199	85%	Upzoning for greater density and external infrastructure funding

**Table 1 Summary of PDA Readiness Assessment Results (page 3 of 3)**

No.	PDA Name	Plan Bay Area Allocated Units	Capacity Units	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
				Number	% of Total Allocation		Number	% of Total Allocation	
45	San Jose: Downtown "Frame"	10,090	8,500	8,883	88%	Site availability and reliance on higher-density construction	9,350	93%	Parcel assembly tools
46	San Jose: Greater Downtown	15,160	11,802	9,501	63%	Site availability and reliance on Type I construction	10,179	67%	Parcel assembly tools
47	San Jose: Oakridge/Almaden Plaza Urban Village	7,300	7,300	2,920	40%	Viability of existing uses and planning "horizon" constraints	3,650	50%	Relaxation of "horizon" phasing constraint
48	San Jose: North San Jose	32,850	32,000	24,000	73%	Policy constraint tying housing to employment growth	32,000	97%	Removal of housing phasing constraint
49	San Jose: West San Carlos and Southwest Expressway Corridors	9,810	4,245	4,075	42%	Site availability and policies on phasing	4,839	49%	Parcel assembly tools and adjustments to "jobs" requirements
50	San Leandro: Downtown Transit Oriented Development	3,690	3,430	1,981	54%	Limited site availability and infill parcelization	2,341	63%	Parcel assembly tools available
51	San Mateo: El Camino Real	1,200	1,936	1,162	97%	Infill parcelization and grade separation	1,646	137%	Parcel assembly tools and external infrastructure funding
52	San Mateo: Rail Corridor	4,660	5,838	4,670	100%	Infrastructure needs for rail grade separation	5,546	119%	External infrastructure funding
53	San Rafael: Downtown	1,350	2,848	997	74%	Lack of plan and entitlement process	1,282	95%	Planning efforts undertaken to rezone area or priority areas
54	San Ramon: North Camino Ramon	1,780	1,500	1,050	59%	Market conditions and value of existing uses	1,050	59%	No amendments proposed
55	Santa Clara: El Camino Real Focus Area	3,560	4,146	2,902	82%	Infill parcelization and single-family adjacency to El Camino limit taller development	3,110	87%	Parcel assembly tools available
56	Santa Clara: Santa Clara Station Focus Area	3,410	2,250	1,913	56%	Limited sites, existing value of uses, and transit infrastructure needs	2,104	62%	Expanded capacity through rezoning
57	Santa Rosa: Downtown Station Area	3,900	3,250	1,300	33%	Market conditions and infrastructure needs	2,113	54%	Improved financing strategy
58	Santa Rosa: North Santa Rosa Station	1,960	4,310	1,293	66%	Market conditions and infrastructure needs	2,155	110%	Improved external infrastructure financing strategy
59	Santa Rosa: Roseland	2,920	2,920	1,460	50%	Market conditions and infrastructure needs	2,044	70%	Parcel assembly tools and improved infrastructure financing strategies
60	South San Francisco: Downtown	3,110	5,600	2,156	69%	Site availability, EIR capacity limits, and reliance on higher-density construction	3,388	109%	Updated EIR, parcel assembly tools, and external infrastructure funding
61	Sunnyvale: El Camino Real Corridor	4,410	4,410	3,749	85%	Infill parcelization	3,969	90%	Parcel assembly tools available
62	Sunnyvale: Lawrence Station Transit Village	2,760	4,649	3,022	109%	EIR based on sub-optimal density, would require amendment	3,719	135%	EIR amended
63	Walnut Creek: West Downtown	2,580	2,500	1,625	63%	Infill parcelization and value of existing uses	2,250	87%	Parcel assembly tools available
64	WCCTAC: San Pablo Avenue Corridor	1,590	1,454	1,018	64%	Market conditions and infill parcelization	1,163	73%	Parcel assembly tools available
65	Windsor: Redevelopment Area	1,200	1,538	769	64%	Market conditions and infrastructure needs	1,076	90%	Improved infrastructure funding (EIFD) and parcel assembly tools available
<b>TOTAL</b>		<b>337,632</b>	<b>382,231</b>	<b>234,740</b>	<b>70%</b>		<b>292,744</b>	<b>87%</b>	

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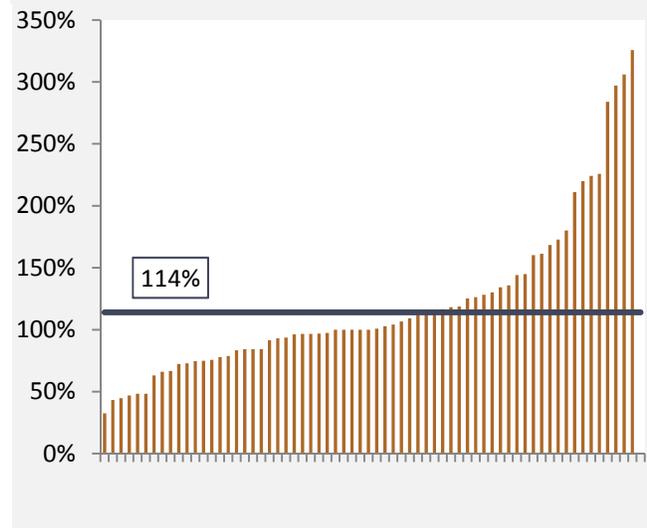
Key findings of the PDA Assessment Update are as follows:

1. **The 65 PDAs in the sample for this study jointly include the majority of housing units forecast under Plan Bay Area.** The 65 PDAs selected for this survey are allocated 337,632 new units under *Plan Bay Area*, more than half of all units forecast for the region and roughly 2/3 of all units allocated to PDAs. The sample includes PDAs in all nine Bay Area counties and in nearly 40 cities, including each of those 16 cities projected to receive the most units under *Plan Bay Area*. The sample also includes all 20 PDAs which were evaluated in the initial PDA Assessment. As expected given their wide distribution throughout the Bay Area, the PDAs exhibit a range of market conditions, development opportunities, and development constraints.

2. **The PDAs vary substantially in their capacity to physically accommodate the 2040 housing allocation, but in aggregate appear to have adequate capacity.** Substantial development capacity exists in the

PDAs given current local land use policy as applied to identified “opportunity sites” (potential development sites), but some upzoning or increase in allowable densities will be required to meet the *Plan Bay Area* growth allocations in some PDAs. In aggregate, **Table 1 and Figure 3** indicate that, under the current or anticipated land use policies and site conditions, the 65 PDAs in the sample currently have physical capacity to accommodate 114 percent of the housing growth that has been allocated to them in *Plan Bay Area*. However, there is substantial variation among PDAs; in some cases current capacity greatly exceeds the *Plan Bay Area* growth forecast while it falls substantially short in others.

**Figure 3 Sample PDAs’ Physical Capacity as % of 2010-2040 Unit Allocation (Baseline Scenario)**



3. **Overall “readiness” reflects the number of housing units EPS projects can be expected to be built in the PDA based on multiple factors.** “Readiness” varies substantially among the PDAs with some expected to add units in excess of the *Plan Bay Area* forecast while others may fall well below the forecast because of the existence of a range of constraints, which will impede full development of the PDAs. Constraints identified in the PDA assessment are described below in **Table 2**. Where such conditions exist, EPS has “discounted” the number of units likely to be built in the PDA to reflect the expected scale and longevity of the constraint (e.g., Is it temporary? Will it get worse over time?).

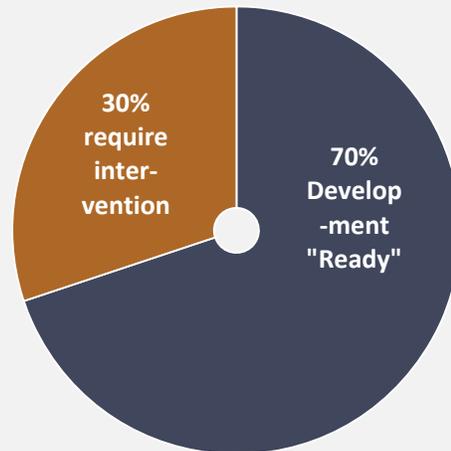
**Table 2 Key Constraints on Housing Development in PDAs**

Readiness Criteria	Key Constraints Identified
<p><b>1) Physical Capacity</b></p>	<p><b>Some PDAs do not appear to have adequate developable sites or zoning allowances to reach their 2040 housing allocation.</b></p> <p>PDAs with low capacity include highly constrained areas (e.g., corridors with shallow lots or where existing development is still economically viable), areas where additional planning work may result in additional capacity via rezoning (e.g., Livermore’s East Side PDA), or mixed-use environments wherein proposed residential uses must compete with other uses for scarce land (e.g., Downtown Berkeley).</p>
<p><b>2) Planning/Entitlement</b></p>	<p><b>Some PDAs have policies limiting the pace or requirements for housing development.</b></p> <p>Overall, local planning and zoning policies are consistent with the uses and densities envisioned in <i>Plan Bay Area</i>, but there are cases where there are policy impediments. Examples include growth management policies limiting the pace of housing construction, and locations where proposed housing projects are being required to provide extraordinary community benefits.</p>
<p><b>3) Community Support</b></p>	<p><b>Total unit growth is projected to be limited in several PDAs by successful community and/or political opposition to development.</b></p> <p>Though PDAs have been identified as priority growth areas by the jurisdictions themselves, opposition to development remains in some areas, particularly in communities where new development has increased significantly and in places with strong displacement and gentrification concerns.</p>
<p><b>4) Market and Feasibility</b></p>	<p><b>In several PDAs, achievable price points do not support the construction costs required to achieve the densities implied in the housing allocation.</b></p> <p>Where housing prices are relatively low or moderate, the type of construction that is feasible can be constrained. For example, places that allow high-rises may only achieve mid-rise, and places that allow multi-family may settle for townhomes. In these cases, the PDAs’ unit production estimates have been reduced.</p> <p><b>In some PDAs, the prices and challenges of acquiring developable land is a major impediment to new housing.</b></p> <p>Specifically, EPS found three factors that raise costs in some PDAs:</p> <ul style="list-style-type: none"> <li>(1) Existing uses (such as shopping centers) may be worth more to the property owner than the underlying land is worth for new development.</li> <li>(2) The recent upzoning of many downtown or transit-areas in cities around the Bay Area have raised landowners’ expectations with regard to land value and land sale pricing.</li> <li>(3) High costs of parcel assembly in locations with small and disjointed parcels which must be combined for a developable site.</li> </ul> <p><b>In some PDAs, zoning or design requirements increase housing development costs and/or limit values, thereby affecting production.</b></p> <p>Selected examples include high parking ratios, land dedications for new thoroughfares, and mandatory inclusion of commercial space or affordable housing.</p>
<p><b>5) Infrastructure Needs</b></p>	<p><b>Some PDAs require high-cost infrastructure improvements to accommodate new housing, but do not have reasonably foreseeable funding sources.</b></p> <p>Some PDAs have existing infrastructure (transportation, water/wastewater, schools, etc.) that can support infill development; however, in many PDAs infrastructure is inadequate and substantial new investment is needed to improve readiness. In most cases, a concerted effort to assure adequate infrastructure will be an ongoing local and regional effort.</p>

4. ***Under “baseline” conditions, in aggregate, the sample PDAs appear “ready” to accommodate 70 percent of the housing growth allocated to them.***

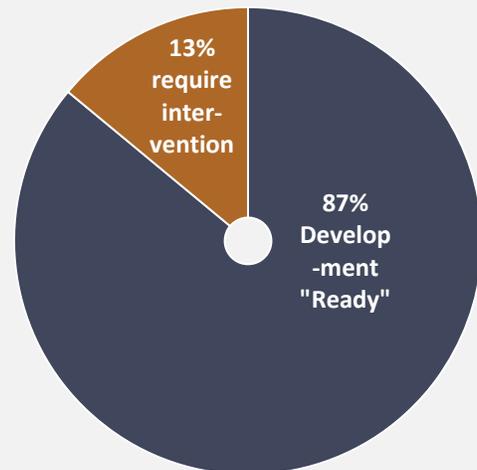
As shown on **Table 1** and **Figure 4**, EPS estimates that 235,000 of the 337,600 units allocated to the 65-PDA sample in Plan Bay Area between 2010 and 2040 are likely to be built under baseline conditions. This estimate has been derived by applying discounting factors for constraints to the capacity for development in each sample PDA. EPS believes these units are likely to be constructed with minimal and/or easily foreseeable changes to existing policies or conditions in the PDAs (i.e., changes already observable or planned).

**Figure 4 Housing Development Readiness of PDA Sample (Baseline Scenario)**



5. ***Specific policy actions have been integrated into an “amended” scenario and are expected to substantially improve the development readiness of most PDAs.*** Plan Bay Area specifies a range of policy actions to be pursued at the local, regional, state and federal levels aimed at improving development readiness of PDAs. As a part of the PDA Assessment Update, a general subset of such policy actions was presented and applied to estimate how such actions might improve development readiness above the baseline projections. These assumed amendments include improvements in infrastructure funding, enhanced parcel-assembly tools, relaxation of policies limiting housing, increases in residential zoning (where that increase would be supported by the market), and successful outreach that results in a lessening of community opposition. Each of these types of “amendments” has already been observed in certain PDAs or at the regional or State level, and thus represent realistic rather than extraordinary changes to “baseline” conditions. EPS has estimated that these policy actions can, over time, substantially improve PDA development readiness, increasing the result from 70 percent of the forecast under the “baseline” conditions to 87 percent under the “amended” conditions, as shown in **Table 1** and **Figure 5**.

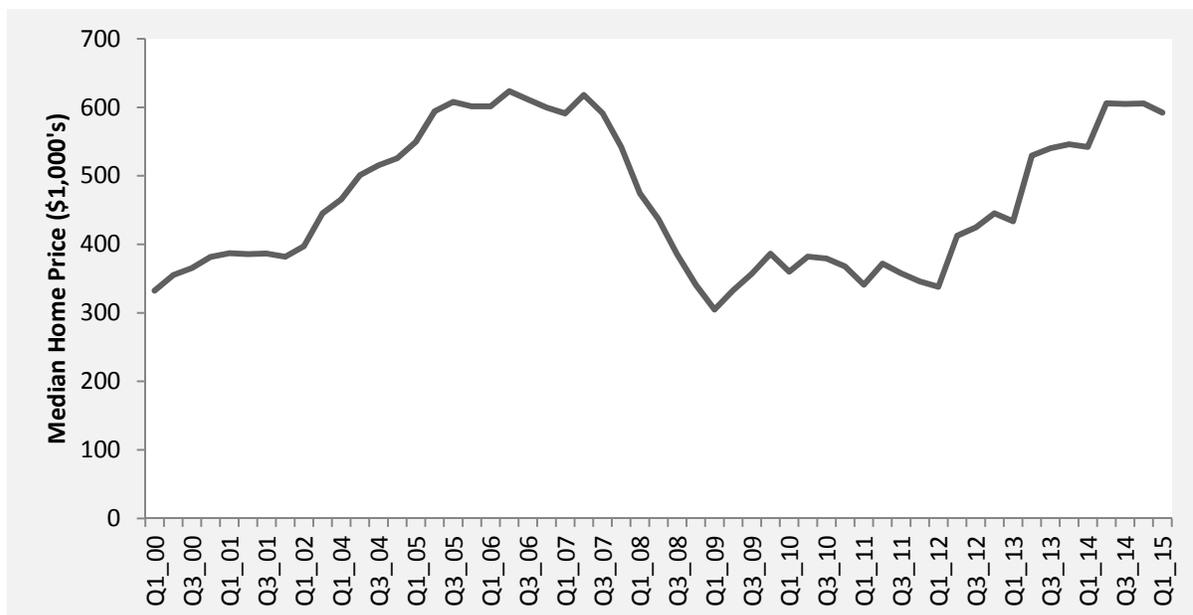
**Figure 5 Housing Development Readiness of PDA Sample (Amended Scenario)**



6. ***Key circumstances have improved since the initial PDA Assessment was completed in early 2013, including an improved housing market and changes to many local zoning and land use regulations which are more supportive of development goals for the PDAs.*** Since the 2013 Assessment, the core Bay Area real estate markets have

strengthened significantly, with the San Francisco-San Mateo-Marín area surpassing prices achieved during the height of the previous housing boom in 2006-2007 (see **Figure 6**). In addition, advanced planning (including Specific Plans with programmatic Environmental Impact Reports) are in place or underway for nearly all of the PDAs reviewed, largely as a result of MTC funding. Other positive changes include growing public and political support for affordable housing in some areas concerned about gentrification and displacement; the availability of new tax increment tools (Enhanced Infrastructure Financing Districts, AB 2 tax increment financing, etc.) and other potential funding sources (cap-and-trade, new County bonds, etc.); and more frequent use of the State’s density bonus law, which has become financially worthwhile in some high-price areas. Perhaps most importantly, long-term market trends indicate increased interest in multifamily housing types that are often required to reach projected PDA densities and growth projections.

**Figure 6 Bay Area Housing Price Trends**



Source: NAHB Housing Opportunity Index

**7. While some key conditions have improved since the last PDA Assessment, some conditions have worsened and new barriers to development have emerged.** In some attractive markets for new housing, public opposition to new development, density, and/or displacement of current residents and gentrification has spurred successful opposition movements, halting or significantly reducing the number of housing units which would otherwise have been produced based on market demand.<sup>1</sup> Some of these same communities have also increased fees and exactions on new housing in PDAs, increasing the cost of

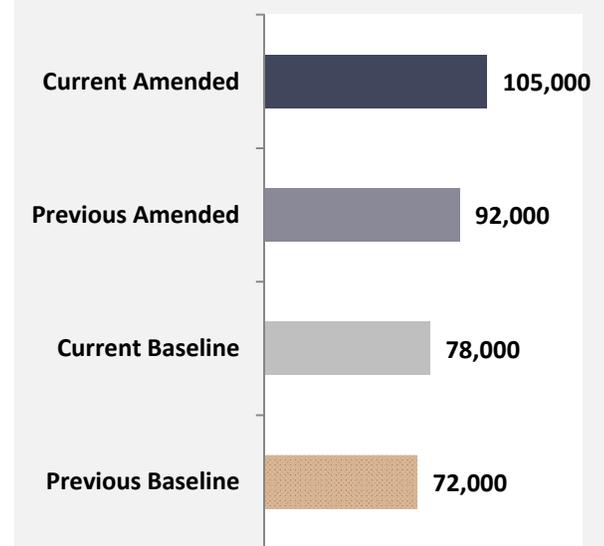
<sup>1</sup> For example, public opposition to proposed developments in Berkeley, Emeryville, and Oakland has resulted in project delays and application rejection (e.g., for Harrold Way, Public Market, and 12<sup>th</sup> Street/Lake Merritt projects, respectively).

construction.<sup>2</sup> While demand for affordable housing is increasing, federal funds available for constructing new affordable units has declined with Community Development Block grants, HOME funds, and Low Income Housing Tax Credits declining from almost \$1 billion in the early 2000s to about \$600 million in 2015.

**8. Several barriers to PDAs achieving their full housing allocation have persisted since the last assessment.** Persistent barriers include: infrastructure needs (primarily transportation and utilities upgrades); existing uses being more valuable than their underlying land for housing development; small, unassembled parcels; adjacencies to existing neighborhoods; and PDAs located in areas with unproven markets for dense development.

**9. Comparing the 20 PDAs evaluated in 2013 to the current assessment of those same 20 PDAs indicates a 10 to 15 percent increase in units projected (see Figure 7).** Given the balance of conditions and circumstances affecting the development readiness of sites within PDAs, EPS’s updated assessment of the 20 PDAs evaluated in 2013 increases the units projected to be built by 2040 by 10 percent in the base scenario and almost 15 percent in the amended scenario. This improvement can be attributed to better market conditions since 2012-2013, but also to the planning efforts that have advanced in many of the PDAs.

**Figure 7 Units Projected in 20 PDAs, 2013 vs. 2015 Projections**



**10. The base and amended case assessments for PDAs in the three major Bay Area cities resulted in an achievement of housing allocation similar to the levels projected in the overall assessment of the 65 PDAs.** Sample PDAs located in Oakland, San Francisco, and San Jose are projected to accommodate 68 percent of units allocated under the base scenario and 85 percent of units under the amended scenario. Units in these cities represent more than 50 percent of all of the allocated units reviewed in this assessment, and 40 percent of all new units allocated under *Plan Bay Area*.

**11. Development of non-PDA areas will face many of the same categories of constraints as identified for the PDA areas.** *Plan Bay Area* anticipates that 20 percent of future housing growth in the region will occur beyond PDA boundaries, in “non-PDA” areas that range from “greenfields” (undeveloped land, often former agriculture uses) to established neighborhoods. While greenfield development typically does not face constrained parcels, existing uses, or the high-construction costs associated with multifamily buildings—all barriers typically of infill development—unit development in greenfield settings do face challenges, such those described below, in **Table 3**.

<sup>2</sup> For example, Berkeley passed a resolution requiring community benefits of \$100-\$150 per rentable square foot for space taller than 70 feet in proposed high-rises in its Downtown.

**Table 3 Key Constraints on Development in Non-PDA Areas**

Non-PDA Constraints	Description
<b>1) Policy Constraints</b>	Capacity for substantial residential development in suburban locations in the Bay Area is limited to a few areas given land use and urban growth policies adopted by the counties and cities of the Bay Area. Suburban growth areas remain in eastern Alameda County (Livermore Valley), eastern Contra Costa County, southern Santa Clara County, and the peripheries of Solano County and Sonoma County cities. Even these areas are subject to significant policy constraints (like large lot sizes, growth management restrictions, habitat conservation requirements, etc.), though they may face different challenges than infill areas.
<b>2) Market Constraints</b>	There will always be a market for suburban and rural single-family housing in the Bay Area, including resale of the substantial existing inventory and modest expansion in response to market demands. However, the recent housing “bust” has shown that peripheral suburban areas have been quicker to lose their home values and slower to recover than the interior areas nearer major employment centers and along transit corridors. EPS expects consumer preferences to increasingly favor urban and/or transit-accessible areas as population, employment, and related congestion increase.
<b>3) Infrastructure and Financing Constraints.</b>	Non-PDAs typically have less existing infrastructure to accommodate new growth, and new suburban subdivisions frequently have carried significant costs to install new roadways, utility extensions, parks, schools, etc. These costs, paired with comparatively low home values in some areas with greater planned “greenfield” capacity, represent a financing obstacle for new subdivision development.

Other non-PDA areas, such as rural development beyond growth limit lines or infill development in non-PDA built neighborhoods, are not expected to represent a major supply of future housing, irrespective of the *Plan Bay Area* forecasts.

**12. EPS has identified several primary policy priorities that we believe can enhance the likelihood of achieving growth as forecast in Plan Bay Area.** This analysis indicates that a number of conditions are shared among many PDAs, and EPS believes it is appropriate to concentrate on such common issues as actions are prioritized. While physical and zoning capacity is certainly an issue in some PDAs, overall the capacity appears to be adequate. However, the entitlement process can be very costly and risky, especially in the strongest market areas, and projects face feasibility challenges due to market conditions, added “discretionary” project requirements, or inadequate infrastructure. EPS believes the top priorities for pursuit should include the following<sup>3</sup>:

**Reinstating key parcel assembly powers and tax-based financing resources –**

Under Redevelopment law in effect until 2012, many urban communities in California were able to take action that directly improved the prospects for infill housing development, including parcel assembly and tax-increment financing. Allowing local governments to direct meaningful amounts of local tax increment funding to priority projects, beyond the limited amount likely to occur under Enhanced Infrastructure Financing Districts in most jurisdictions, as well as restoring the important ability to assemble sites in physically

<sup>3</sup> The policy recommendations provided in this report reflect the views of EPS, and do not necessarily represent those of MTC or ABAG.

constrained areas can make substantial contributions to PDA housing growth. *Note: Near the completion of this report, AB 2 was signed into law, restoring some of the powers and financing capacity under previous Redevelopment law.*

**Increasing funding for housing-supportive investments in PDAs** – In many Bay Area communities, housing developments are required to pay impact fees, provide community benefits, or otherwise bear costs for infrastructure and public services that significantly raise the costs of construction and arguably constrain the amount of new housing produced. Whether at the local, regional, state, or federal level, generating more financial resources shared by the broader constituency can help to reduce high costs for new construction, thus potentially enhancing the feasibility of housing development.

**Working to change the anti-growth political environment** – Studying and communicating best practices for project design, regulation, and approval can make a substantial difference in achieving housing growth, particularly if paired with education regarding the expected conditions if housing is *not* accommodated within PDAs.

If successful, these efforts will help to address many of the constraints identified in this Readiness Assessment, and increase the likelihood of achieving Plan Bay Area housing growth projections. In EPS’s opinion, success in these three broad areas – and especially in shifting the political landscape to be more “growth positive” in infill areas – will enable the Bay Area to achieve greater than the Amended Scenario’s estimated 87 percent of housing growth as projected in *Plan Bay Area*.

**13. EPS recommends a variety of general policies and specific actions that can be taken at the local, regional, state, and federal level to remove barriers to intensification in the PDAs.** An overarching theme of these recommendations is a move to a more “development positive” posture. The growth management, planning, and environmental review policies of the past generation that focused on limiting new development are in need of fundamental reform at the local and state levels. Regional funding to identify and promote “best practices” in addressing common PDA constraints and concerns may be helpful to inform local policymakers as they grapple with complex land use issues. Of course, additional and directed state and federal funding for PDA infrastructure and development projects will also be critical. **Table 4** summarizes the recommendations (described fully in **Chapter 4**).

**Table 4 EPS’s Policy Recommendations for Regional Agencies**

Recommendation	Description
<b>Regional Actions</b>	
1) Planning, Research, and Education	Study best practices for site assembly, post-Redevelopment in PDAs with small and irregular parcels.
	Develop a model for inter-jurisdictional sharing of governmental revenues.
	Analyze fiscal and economic impact of housing.

	Study and identify layers of review and local processes that delay project approvals.
	Study and publish fees, community benefits, and other charges to housing in PDAs.
	Study alternative approaches to achieving affordable housing beyond inclusionary and nexus fees (e.g., housing bonds, regional sharing of affordable allocations, affordability by design, etc.)
	Study effective stakeholder engagement.
2) Funding for Projects	Continue and expand site acquisition funding (revolving loan or other type of funding).
	Target funding to housing production by offsetting transportation-related costs on- and off-site (e.g., like the Housing Incentive Program).
	Continue to invest in infrastructure and require a match for grants. Match may come from other regional sources (e.g., CMAs discretionary funds) or from local sources (e.g., EIFDs).
<b>Local Actions</b>	
1) Continue to refine and update supportive regulations	Consider "use-by-right" zoning districts, form-based zoning codes, "incentive-based zoning", centralized parking nodes, accessory dwelling unit, and other types of regulations to support development which achieves densities and development envisioned for the PDAs.
2) Continue to develop and update Program EIRs	Complete and update Program EIRs for all PDAs; many cities reviewed have current programmatic EIRs in place.
3) Create CIPs for PDAs	Create PDA-specific CIPs; many cities have done this.
4) Create Financing Plans for PDA CIPs	Create PDA-specific Financing Plans; many cities have a list of potential sources but do not have funding mechanisms such as area-development impact fees, Enhanced Infrastructure Financing Districts or Community Facilities Districts, in place.
5) "Boomerang" RDA funds for PDAs	Consider reinvesting tax increment from former RDA-project areas back into the project areas (some of which are PDAs); the City of Oakland and Counties of San Mateo and Santa Clara have such policies.
<b>State Actions</b>	
1) Raise funds for SB 375 implementation	Raise and direct new funding sources for infrastructure to prepare PDAs for development. Examples include bond measures (like Props 1B and 1C), property transfer taxes/recording fees, increased taxes on motor vehicle fuels, among others.
2) Reinstigate some RDA powers & resources	Reinstigate parcel assembly powers to allow cities and counties to purchase land for economic development/redevelopment; Consider incentivizing EIFDs and Community Revitalization Investment Authority (just signed into law in 2015, Assembly Bill-2) through a State matching funds program.
3) Update and modernize CEQA	Link ongoing CEQA reform efforts to achieving AB-32 and SB-375 objectives by reducing costs and risks associated with development in PDAs, while maintaining mitigation of environmental impacts. Reforms might include: eliminating duplicative review of impacts and tightening CEQA lawsuit processes.

4) Alleviate “fiscalization of land use” effects	The current approach to taxation creates incentives to attract development that maximizes sales tax revenues, but creates a disconnect between the location of jobs, housing and transportation. Fiscal reform efforts should support a long-term adjustment to commercial or residential tax rates to balance the financial incentives for new development.
<b>Federal Actions</b>	
1) Increase funds for affordable housing	Increasing this funding source will expand housing opportunities for more residents and reduce the cost burden of this important community on new construction in PDAs.
2) Increase funds for transit systems	The value of land around many PDAs is dependent on a strong transit network. Many key networks including BART and MUNI are nearing capacity. Ensuring that these networks grow in proportion to region-wide growth will be critical to the successful development of PDAs.
3) Increase funds for other infrastructure and housing	Funds for OBAG and other MTC-administered programs are supported with federal funds. Expansion of the resources in these programs will be important in preparing PDAs with significant clean-up or infrastructure costs which are beyond those which can be borne by new construction.
4) Support financing reforms that may facilitate condominium construction	Reform post-Recession Federal Housing Administration (FHA) rules requiring, among other things, that 50 percent of all condominium units be sold before a buyer may qualify for an FHA-backed mortgage.

If the policy and program recommendations are pursued with success at each level, EPS anticipates that the PDAs can achieve *more* housing than projected in the “amended” scenario evaluated under this PDA Assessment Update, as the “amended” projections assume only a subset of the policy and funding efforts are undertaken. This assessment clearly demonstrates that PDAs and non-PDAs both face significant challenges to achieving the housing needed in the Bay Area, and that the status quo must be improved upon if *Plan Bay Area’s* vision and objectives are to be realized.

## 2. PDA ASSESSMENT UPDATE

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### Study Purpose

By definition, all the PDAs are or will be served by transit and are planning for intensified growth patterns. Nonetheless, there is considerable variation among the PDAs regarding their individual market potential, development constraints, and related development capacity and feasibility (i.e., readiness for development). This report provides an independent assessment of PDA development readiness, documenting both opportunities and constraints.

An initial survey of development readiness was conducted by ABAG and MTC in 2010 and a detailed review of 20 PDAs was conducted for MTC and ABAG by EPS and CD+A in 2012-2013 (the initial PDA Assessment). Following completion of that initial PDA Assessment, ABAG and MTC adopted *Plan Bay Area* and its Environmental Impact Report in July 2013.

The adoption of *Plan Bay Area* was challenged by the *Building Industry Association Bay Area v. Association of Bay Area Governments, et al.* (Alameda County Superior Court Case No. RG13692098). As part of a settlement agreement, ABAG and MTC agreed to update and expand upon the initial (2013) PDA Assessment in advance of the preparation and adoption of the next regional plan, slated for completion in 2017. It was further agreed that the methodology used for the PDA Assessment Update should be consistent with the approach taken in the initial PDA Assessment. This document and the process of developing it represent that update.

This updated and broader evaluation assesses the feasibility of achieving the growth pattern reflected in *Plan Bay Area* and identifies resources required and actions necessary to achieve the projected development pattern. The assessment of development readiness can guide potential refinement and implementation of *Plan Bay Area* by identifying feasibility constraints and providing generally applicable implementing actions and policies, defining subsequent steps by ABAG and MTC, and identifying additional actions and resources needed at the federal, state and local levels to improve PDA development readiness. The resulting implementation program can help achieve the land use mix and development pattern reflected in *Plan Bay Area*.

### Study Methodology

Development Readiness in the context of this report is defined as the likelihood that a given area (e.g., a PDA) can achieve a prescribed type and amount of development within a given time. Development readiness is influenced by a range of physical opportunities and constraints, land use regulations, market factors, and availability and capacity of physical infrastructure. In order for the development readiness assessment to be broadly applicable, evaluation criteria and methods consistent with industry-standard development planning principles were developed. The steps to produce the PDA Assessment Update are described below.

### Sample Selection

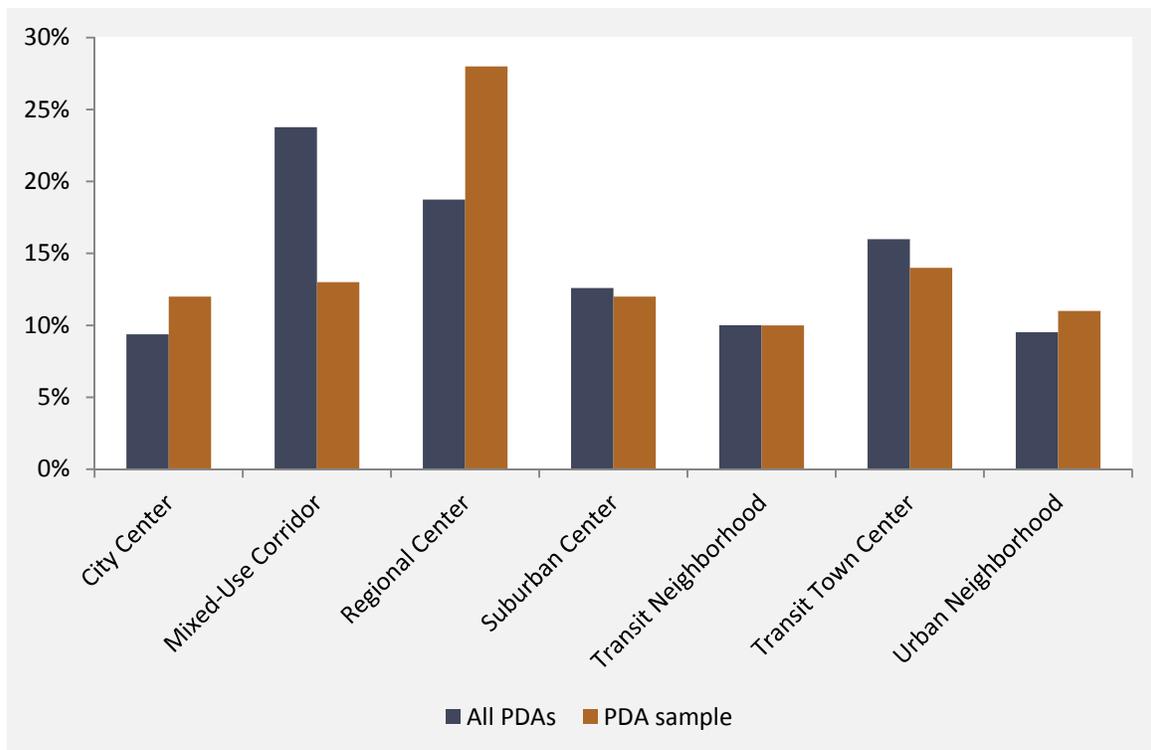
The 169 PDAs included in *Plan Bay Area* are spread among each of the nine Bay Area counties, and include places as different as Downtown San Francisco and undeveloped land adjacent to the freeway in Antioch. In sum, roughly 530,000 new housing units through 2040, representing

about 80 percent of the 660,000 new housing units forecast for the entire Bay Area, have been allocated in PDAs in *Plan Bay Area*.

Sixty-five PDAs were selected as a representative sample of the total, jointly including more than 50 percent of all of *Plan Bay Area's* allocated housing growth in the region, and 2/3 of all units allocated to PDAs. The sample includes PDAs in all nine Bay Area counties and in nearly 40 cities, including each of the 16 cities projected to receive the most units under *Plan Bay Area*. Each of the 20 PDAs evaluated under the initial 2013 PDA Assessment was included among the 65 PDAs evaluated in this update. **Figure 2** in the Executive Summary shows a high-level map of the PDAs evaluated for this analysis, demonstrating their geographic dispersion throughout the region.

The sample also reflects the diversity of market and physical conditions present among the region's PDAs, and includes representatives of seven different PDA place types identified by ABAG and MTC (see **Figure 8**). As such, the sample is expected to reasonably represent the conditions and expectations in the totality of the *Plan Bay Area* PDAs, and the readiness assessment results may be extrapolated to the Plan overall.

**Figure 8 All PDAs and Selected PDAs by Place-Type (percent of total)**



Local jurisdictions have selected their PDA place type based on characteristics that they envision for the future, not necessarily based on their current conditions. As a result, even places categorized similarly may have very different existing conditions. For example, Antioch's Hillcrest Station Area and Walnut Creek's Core are both identified as "Suburban Centers," though the Hillcrest PDA is almost wholly unimproved land while Walnut Creek's Core has a substantial existing base of employment, retail, and housing. EPS aimed to reflect this diversity so that the issues pertinent in a variety of Bay Area settings would be reflected in the sample.

## Review of Physical and Planned Capacity

EPS's subcontractor Community Design + Architecture (CD+A) reviewed current planning regulations for each of the PDAs in the sample set, including Specific Plans, General Plans, Housing Elements, Environmental Impact Reports, zoning documents, etc., to understand the allowable uses and densities within these PDAs. In some cases, the plans already summarized the number of housing units that could be accommodated within the subject areas.

Where such plan documents did not already provide assessments of the physical capacity for growth in the PDAs, CD+A conducted an assessment of "opportunity sites" representing vacant or underutilized properties in the PDAs. This was done primarily through visual inspection of aerial photographs and/or onsite assessment of PDAs. Parcels on which development was clearly well below the allowable density were identified as having potential for development over the coming decades.

For example, a site on which mixed-use development of 40+ units/acre is allowed, but on which a small retail building with surface parking currently sits, has been identified as an opportunity site. Based on this assessment and an aggregation of allowable development densities on the opportunity sites, CD+A estimated the amount of development for which there is current physical and planned capacity. EPS used the estimate as a starting point for discussions with city staff, who either verified the figures specifically, agreed that they were reasonable, or suggested adjustments based on their more detailed understanding of existing conditions and opportunities.

## Market Assessment

To inform our understanding of local market conditions, EPS gathered basic socio-economic and real estate data for each PDA and its surrounding jurisdiction, including the following data:

- Median household incomes.
- Percentage of renter households and percentage of attached or multifamily housing units (to understand the character of local housing).
- Average price per square foot sale prices for for-sale multifamily product and average rental rates for apartment complexes (50+ units), to understand basic housing prices in assessing the feasibility of new construction.
- Citywide residential permit data, segmented by single-family and multifamily units, from 1980 to 2014, to understand trends in housing production in the jurisdiction and compare historical production to the rate of production that would be needed in the PDA to meet the allocation.

In addition, EPS reviewed regional data to understand broader trends regarding housing permitting and production, as well as home prices and rents over time. Sources included information from the US Census Bureau, California Department of Finance, commercial data providers, and findings from MTC's "Vital Signs" reports, among others. This information served as the basis for understanding market demand and financial feasibility factors for new housing in and around each PDA, but was further supplemented through interviews as discussed below.

## **Interviews with Local Jurisdictions**

Having reviewed CD+A's assessment of planned development capacity in each PDA and socioeconomic and permit data, EPS conducted interviews with staff from each of the jurisdictions whose PDAs were in the sample. These interviews typically involved planning staff, but in some cases also involved staff in economic development, public works, or other departments. The interviewees were asked a series of standardized questions, from which the conversations branched off to seek clarification or more information regarding locally-specific conditions and issues. The standardized questions were as follows:

### ***Planning and Entitlement***

1. Is there a Specific Plan or similar regulatory document in place or underway that promotes and incentivizes infill housing development in the PDA?
2. What is the current status of environmental clearance for infill development in the PDA? Program- or project level EIR?
3. Will it be necessary to displace existing stable residential areas to achieve plan development objectives?
4. Is the pace or scale of housing development in the PDA constrained by any atypical planning policy (e.g., annual or phased "caps" on growth, minimum densities, parking maximums, mixed-use requirements, etc.)?

### ***Market and Investment Attractiveness***

5. How many units have been developed in your PDA since 2010? What are the characteristics of these projects (multifamily vs. single family, affordable vs. market, etc.)?
6. How many units are in the pipeline, what is their status, and what are their characteristics?
7. What key factors within or surrounding the PDA make it attractive for real estate investment?
8. What key factors within or surrounding the PDA create disincentives to real estate investment?

### ***Community Support***

9. Have elected officials expressed support for development in the PDA consistent with Plan Bay Area?
10. Have housing developments consistent with the PDA plan been proposed to and approved by the current or recent City Council? Has the Council's general trend been to promote increased or decreased density compared to developer proposals?
11. Has there been any organized and successful citizen opposition to development in the PDA?
12. Have there been ballot initiatives or referenda that have limited development potential within the PDA?

### ***Infrastructure Capacity and Needs***

13. Is there currently adequate infrastructure capacity to meet demands of PDA development?

14. If not, are the necessary infrastructure master plans in place? What are the top three improvements needed from a cost perspective?

#### **Financial Resources**

15. Is there an infrastructure financing plan in place that demonstrates funding for needed infrastructure?

16. What development impact fees or other development impact mitigations are required in the PDA?

17. Are there any other major funding constraints or challenges that may limit PDA development?

EPS found the interviewees to be well-informed and forthcoming about the issues and conditions affecting development in their PDAs. EPS also found the interviewees to be thoughtful and pragmatic about the potential policy and other changes that could enhance the prospects for development in the PDAs.

#### **Discussions with Housing Developers**

As part of the Technical Advisory Committee assembled for this project, representatives from three regionally active housing developers and the Building Industry Association were invited to share their experiences generally and within specific jurisdictions as they relate to getting residential projects approved and built. While less formal than the interviews with jurisdictions, these developer discussions covered the same topics and yielded opinions from real estate professionals who may have different perspectives than the jurisdictions' representatives. Also, each of the developers in the Technical Advisory Committee has worked in multiple jurisdictions included in the PDA sample, and could provide cross-jurisdictional comparisons. As with the local staff interviewees, EPS found these developers to be thoughtful and well-informed regarding local policies and processes as well as market and financial considerations.

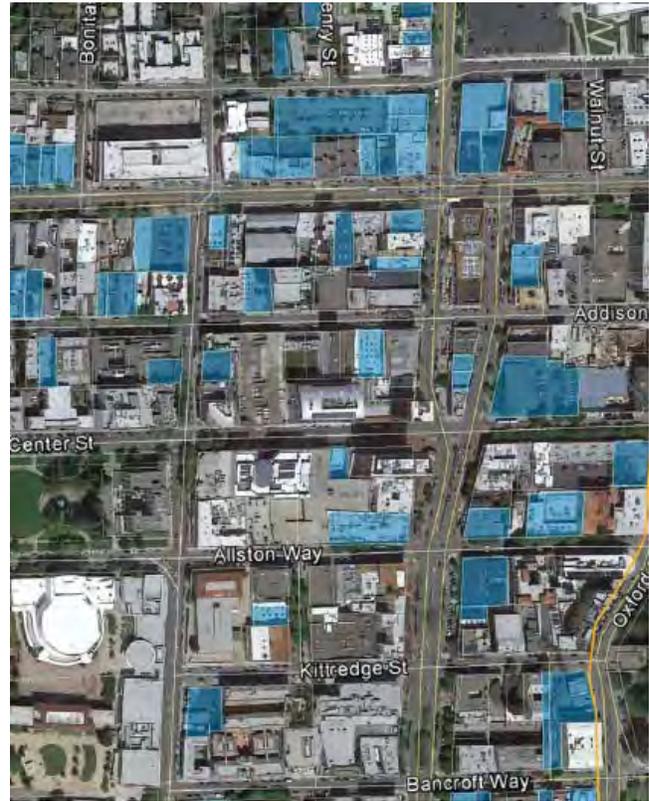
#### **Readiness Assessment**

EPS applied the readiness assessment criteria findings from the previous tasks to each PDA in the sample set. These assessment criteria aimed to reflect EPS's understanding of various issues and conditions in each PDA:

- Planning and Entitlement Criteria—status and characteristics of Specific Plans, Environmental Impact Reports, and other planning documents, and whether or not achievement of substantial densities would require displacement of or conflicts with existing residential neighborhoods.

- Community Support—whether elected officials have exhibited support for higher-density housing through project approvals, adoption of Specific Plans, etc., and whether community groups have actively supported or significantly opposed such relevant actions or projects.
- Market and Investment Attractiveness—the type and pace of recent development; the pipeline of planned development projects; general market indicators (incomes, prices, etc.); whether prices appear high enough to support new construction costs at required densities; whether parcels are large or regular enough to accommodate common construction formats (e.g., see **Figure 9**); and whether other conditions may detract from consumer location preferences (e.g., poor schools, high crime, environmental contamination, etc.).

**Figure 9 Example of Opportunity Sites on Small, Unassembled Parcels (Downtown Berkeley)**



- Infrastructure Capacity, Needs, and Financing—whether existing roadways, water/wastewater, parks, and other infrastructure are adequate, need minor upgrades, or need major upgrades to accommodate new growth; whether a plan or mechanism to finance such improvements is already in place; and whether future improvements represent a significant financial burden compared to the value of future housing development.

A “generic” example of the readiness assessment model is provided as **Table 5** (which is three pages long), with notes explaining the procedure as well as the types of judgments made by EPS. As shown, EPS has begun with the current planned capacity (Line 1) and compared that to the *Plan Bay Area* growth allocation (Line 2) to determine whether capacity is adequate or falls short (Line 3). EPS then estimates the likelihood and scale of potential capacity increases, reflecting whether and to what extent zoning changes and other regulations may increase the capacity compared to current policies (Line 4). The product thus far is the estimated planned capacity under various timeframes – through 2020, 2030, and the plan horizon year of 2040 (Line 5).

From that point, EPS estimates the likely production of housing units in each timeframe by summing the “discounting” coefficients of the various constraints described above (Line 6, a summation of the detailed evaluation criteria scoring on the subsequent two pages of the table). The discounting is applied to each criterion to the extent that EPS anticipates it will be a constraint on development. For example, in PDAs where housing prices are relatively low and achievement of the *Plan Bay Area* housing growth forecast would require dense development

that is comparatively costly to construct, market and feasibility factors may represent the primary constraints, and thus yield the highest “discount” factors. In other PDAs, the market may be strong but major infrastructure improvements are required to provide transportation or other capacity for the forecast units, and thus the infrastructure criteria may yield the highest discount factors. Each PDA has been evaluated uniquely to identify the nature and the severity of constraints on achieving its housing growth forecast.

In addition to an overall assessment of achievable housing growth through 2040, EPS has included time-based estimates that reflect our judgment of conditions that will affect the pace of development, including factors that may enhance production over time (such as expected upzoning) and others that may pose greater constraints in later years (such as the reduction in developable parcels as development occurs on the parcels best suited to new construction). For example, each PDA has a discount factor applied under “market” criteria reflecting EPS’s assessment of the pace at which relevant housing development has been occurring in the PDA and/or larger community, and this discount factor generally diminishes over time, thereby yielding an increasing number of potential units over time. .

In the generic example on **Table 5**, this process suggests that 1,838 of the 4,010 housing units allocated to the PDA may be expected through 2040, thus representing 46 percent of the allocated growth under *Plan Bay Area* (Lines 5, 7, 8).

In each case, EPS constructed a “baseline readiness” assessment, as well as an “amended readiness” assessment. The “baseline readiness” reflects the current opportunities and constraints for development in the PDAs, with adjustments from existing conditions only for factors we know to be relevant based on current or recent activities – for example, an upzoning of development capacity in places where such plans are being formulated. Otherwise, the “baseline readiness” expresses EPS’s judgment of how many housing units are likely to be developed through 2040 and in the intervening decades in each PDA under currently observable conditions.

The “amended readiness” reflects interventions that are not currently planned but, in EPS’s estimation, represent reasonable actions at the local, regional, or state level that can enhance the prospects for development in the PDAs. In red text, **Table 5** provides illustrations of the types of assumptions that EPS has included in the “amended readiness” scenarios. Some common amendments include improvements in infrastructure funding, availability of parcel-assembly tools, relaxation of policies limiting housing, increases in residential zoning (where that increase would be supported by the market) and a lessening of community opposition.

**Table 5 PDA Readiness Criteria Worksheet (page 1 of 3)**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	1,935				Net new housing growth potential based on existing plans (where quantified) or application of average allowable densities to visually identified opportunity sites.	
		2	Plan Bay Area new housing allocation				4,010	The increment of new housing allocated to the PDA in Plan Bay Area	
		3	Capacity surplus or (shortfall)		(2,075)				Difference between estimated housing capacity and allocation (A2 and A1).
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)			0%	0%	0%	EPS has made adjustments in Base Scenario where we are aware that rezoning is already being considered, or in Amended Scenario where existing zoning allowances represent limits that can be exceeded without significant increase in visual impact (e.g., increase from 27 to 40 DU/acre but not to 100 DU/acre).
		5	Estimated gross housing capacity at each period			1,935	1,935	1,935	Calculation based on projected increase to currently allowed densities.
		6	Sum of Capacity Constraint Coefficients			0.55	0.25	0.05	Summation of constraints under Base or Amended Scenarios.
			Planning and Entitlement Criteria			0.00	0.00	0.00	
			Community Support			0.10	0.00	0.00	
	Market and Investment Attractiveness			0.30	0.15	0.00			
	Infrastructure Capacity, Needs, and Financing			0.15	0.10	0.05			
7	EPS estimate of housing production given constraints				871	1,451	1,838	Calculation of potential housing production, calculated as gross housing capacity by period (A5) reduced by percentage of constraint coefficients (A6).	
8	Percentage of PDA 2040 housing allocation accommodated				22%	36%	46%	Calculation of total estimated housing production by period, divided by total net new units in Plan Bay Area allocation through 2040.	
			Summary	Summary of PDA, context, and constraints on projection.					

**Table 5 PDA Readiness Criteria Worksheet (page 2 of 3)**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
B.	Planning and Entitlement Criteria	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	If yes, no discount is applied. If no, then a discount is applied in the first period. In most cases, a specific plan is anticipated to be prepared sometime before 2020, thus the discount is removed for the 2020 and 2030 periods.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	If PDA allocation or estimated capacity requires redevelopment of residential neighborhoods, EPS has considered this is a constraint on probable housing growth in the Base Scenario.  <i>In certain cases, EPS has reduced the constraint coefficient in the Amended Scenario to reflect the potential return of Redevelopment-type powers for parcel assembly.</i>
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years		0.05	0.00	0.00	If elected officials have actively opposed higher-density development projects or planning consistent with PDA allocation, EPS has considered this a constraint in the Base Scenario.  <i>In the Amended Scenario, EPS has in several cases reduced this coefficient in outer years assuming that electeds would be more pro-density.</i>
		2	History of neighborhood opposition		0.05	0.00	0.00	If community groups have actively opposed higher-density development projects or planning consistent with PDA allocation, EPS has considered this a constraint in the Base Scenario.  <i>In the Amended Scenario, EPS has in several cases reduced this coefficient in outer years assuming that community groups would be more pro-density.</i>
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city		0.30	0.15	0.00	If PDA and/or City (in certain cases) have not realized significant housing growth in the past decade, EPS has considered this a constraint in the Base Scenario.  <i>EPS has made no adjustment in the Amended Scenario for this retrospective criterion.</i>
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	If PDA and/or City (in certain cases) does not have a substantial pipeline of housing development projects (proposed, permitted, or under construction), EPS considers this a constraint in the first time period.  <i>This constraint is not extended to the years beyond 2020, and no adjustment is made under the Amended Scenario.</i>
		3	General Market Conditions		0.00	0.00	0.00	If PDA and/or City (in certain cases) has low incomes, low housing prices, high vacancies, demographic profiles inconsistent with higher density housing (such as comparatively few small households), limited access to job centers, etc., EPS considers this a constraint in the Base Scenario.  <i>Adjustments are made in the Amended Scenario only where such conditions are expected to be different in the future based on observable trends.</i>
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Where housing prices are low, development costs are high, or sites are limited or constrained, EPS considers this a constraint in the Base Scenario.  <i>Adjustments are made in the Amended Scenario only where such conditions are expected to be different in the future.</i>

Table 5 PDA Readiness Criteria Worksheet (page 3 of 3)

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
D.	Market and Investment Attractiveness <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Where PDA opportunity sites are generally small or oddly configured and held under numerous owners, EPS considers this a constraint in the Base Scenario, unless evidence exists that such small sites have been developed for PDA-type uses in the past.  <i>Under the Amended Scenario, EPS has reduced this constraint coefficient where property assembly for more feasible development may be achievable through re-introduction of parcel assembly-powers.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	Where PDAs have conditions such as high crime, poor schools, access constraints, or environmental pollution, EPS considers this a constraint in the Base Scenario.  <i>Adjustments are made in the Amended Scenario only where such conditions are expected to be different in the future based on observable trends.</i>
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		<b>0.10</b>	<b>0.05</b>	0.00	Where PDAs are known to require major upgrades to transportation, utilities, open space, and similar infrastructure to accommodate new growth, EPS has considered this a constraint in the Base Scenario. In some cases, this constraint is assumed to grow over time, as infrastructure may be nearly adequate for early phases of development while requiring more upgrades for later phases.  <i>Adjustments are made in the Amended Scenario only where it is expected that infrastructure projects can be funded through new programs or revenue sources.</i>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	If the City has not identified an expected approach to funding required infrastructure that is still viable today (e.g., does not assume tax increment financing), EPS considers this a constraint in the Base Scenario. Generally, this constraint is assumed to be rectified through financing plans in later years, even under the Base Scenario.  <i>In the Amended Scenario, the initial phase of development through 2020 is assumed to be bolstered through the creation of a viable financing plan in the next few years.</i>
		3	PDA financing capacity		<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Where required infrastructure costs are estimated to represent significantly more than 20% of the aggregate value of new housing under the projected capacity, EPS has considered this a constraint in the Base Scenario. In some cases, this assessment is more qualitative due to limited information regarding projected infrastructure costs.  <i>In the Amended Scenario, these constraints are assumed to be lessened through the availability of regional funding and/or the use of tax increment through an Enhanced Infrastructure Financing District or other mechanism.</i>

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## Examples of PDA Assessment Results

EPS has produced “baseline” and “amended” readiness assessments for each of the 65 PDAs in the sample. The results vary widely based on the multiple factors that contribute to each area’s readiness. In aggregate, EPS has estimated that the sample PDAs have a “baseline readiness” to accommodate 70 percent of the growth allocated to them in *Plan Bay Area*.

The various enhancements assumed under the “amended readiness” scenarios are estimated to increase the achievable growth to 87 percent of the *Plan Bay Area*-allocated housing units. The models used to evaluate each PDA are included in **Appendix A** to this report. Four examples of PDAs reflecting a range of constraints and opportunities are summarized below.

### San Francisco Downtown-Van Ness-Geary Corridors

This PDA covers a significant portion of San Francisco’s financial, cultural, civic, retail, and tourism areas, and is already developed at high densities. Market support for housing development is strong, and infrastructure upgrades appear reasonably proportioned to the value of new growth. Moreover, zoning allowances in this area are permissive of very high densities, and EPS believes it is reasonable to project that a modest amount of further “upzoning” to allow higher densities may occur through 2040 in the amended scenario, as it has over the past several decades.

However, the number and scale of developable sites is limited because the area is already heavily developed. San Francisco Planning Department analysis has identified capacity for up to 25,423 units, including 3,081 already built between 2011 and 2014, another 6,707 already in the development pipeline, and a maximum of 15,635 new housing units on additional “soft sites.” This capacity figure falls short of the 27,140 units allocated to the PDA under *Plan Bay Area*. The area’s small parcel sizes represent the primary constraint to new housing in this PDA, and EPS estimates that the pace of new housing development will slow over time as the most developable sites are built first.

Under the “baseline” scenario, EPS estimates that 16,525 housing units can be built in this PDA through 2040. The “amended” scenario assumes that selected upzoning increases capacity, that regional funding can support some infrastructure requirements, and that improved parcel assembly tools are available to the city. EPS estimates that 24,406 units could be expected under these conditions. These figures represent 61 and 90 percent of the *Plan Bay Area*-allocated housing growth, respectively.

### San Jose North

This PDA is the location of many technology industry jobs, but has also added an increasing number of multifamily housing units within its boundaries. The City’s plan for North San Jose anticipates increasing densities to allow for roughly 32,000 new housing units in addition to greater numbers of higher-density employment centers. Market forces are strong and infrastructure needs are well within feasible levels. The primary constraint on housing growth in this PDA is the City’s phasing policy, which caps the total number of housing units in each of four phases at 8,000 until 7.0 million square feet of non-residential development is approved. The housing allocation for the first phase is already fully subscribed, but the non-residential development allocation is well below its goal and not expected by City staff to be complete for another five or more years. In the base scenario, EPS has estimated that this phasing restriction

will limit growth to 24,000 units through 2040, or 73 percent of the *Plan Bay Area* allocation. The amended scenario assumes that the phasing restrictions are adjusted to allow housing development to continue based on market conditions, and is projected to yield 32,000 units through 2040, or 97 percent of the *Plan Bay Area* allocation.

### **Alameda Point**

This PDA is primarily comprised of former military land, including Naval Air Station Alameda and the Fleet Industrial Center. Some segments of the PDA have been developed for housing and retail, and additional housing and retail projects are under construction. The majority of the area, however, is the former Naval Air Station that has faced numerous challenges ranging from environmental contamination to historic resources to grossly inadequate infrastructure. In the past few years, the City has taken ownership of a portion of the land from the Navy, completed plans and environmental reviews, solicited and selected a developer, and negotiated an agreement for the first phase of development, including 800 housing units and substantial infrastructure improvements. EPS anticipates that market support for housing in this area will be strong. However, the City has concerns regarding traffic generation, and will seek to achieve significant access upgrades as well as balance jobs and housing over time. In current plans, these sites have been programmed for 1,935 units – fewer than half of the 4,010 units allocated under *Plan Bay Area*. Under the baseline scenario, EPS estimates that this area will be able to accommodate 1,838 new housing units through 2040 (46 percent of the *Plan Bay Area* allocation), constrained primarily by current zoning allowances that reflect the City's concerns regarding traffic generation. Under the amended scenario, EPS assumes that external funding resources are secured for infrastructure and access improvements and that upzoning of allowable densities occurs, which could yield the development of an estimated 2,903 housing units (72 percent of the *Plan Bay Area* allocation).

### **Antioch Hillcrest Station**

This PDA is mostly undeveloped land at the junction of Highway 4 and Highway 160 in eastern Contra Costa County. BART's "eBART" system is under development and will have a station in this PDA in the next few years. A Specific Plan has been adopted that promotes higher-density housing and non-residential development in this area. *Plan Bay Area* allocates 2,290 new housing units to this PDA – just fewer than the 2,500 units anticipated in the Specific Plan. Major constraints in this PDA include a lack of evident market interest in multifamily housing (despite significant housing growth overall) and the significant infrastructure costs required to accommodate the planned growth. Under the base scenario, EPS anticipates that 1,000 housing units can be developed by 2040, or 44 percent of the *Plan Bay Area* allocation. The amended scenario assumes that both external and project-based funding resources are established, allowing infrastructure financing to take advantage of growing tax increment in the PDA. Under this amended scenario, EPS anticipates that development may increase to 1,375 units by 2040, but still only 60 percent of the *Plan Bay Area* allocation due to constrained market conditions in this outlying area.

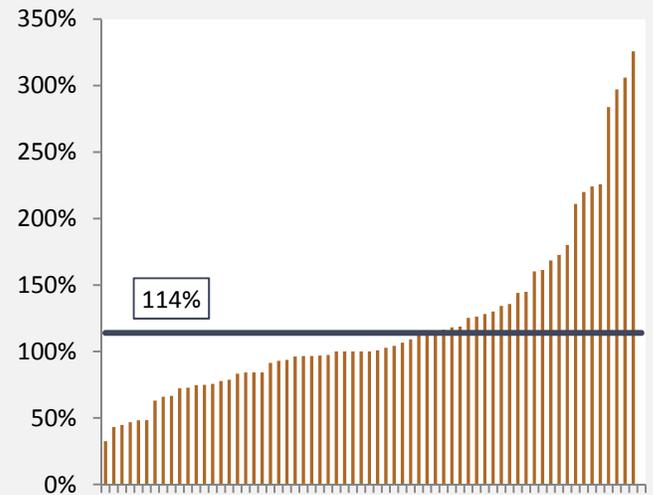
## Overall Findings of PDA Readiness

### Physical Capacity

In the sample selected for review by EPS, PDAs jointly are estimated to have existing planned capacity (i.e., density allowed under current regulations on opportunity sites) for 114 percent of the units allocated to them in *Plan Bay Area*. Some PDAs have capacity for more units than they have been allocated, while others have less capacity (see **Figure 10** for illustration of the range of PDA capacities).

Overall, these results suggest that continued innovative planning and “upzoning” will be required in some PDAs to approach or achieve the PDA housing and employment growth levels envisioned in *Plan Bay Area* by 2040.

**Figure 10 Sample PDAs’ Physical Capacity as % of 2010-2040 Unit Allocation (Baseline Scenario)**



### Planning and Entitlement Processes

In general, the planning and entitlement processes in the PDAs appear not to represent a major constraint on growth. Most communities have been reasonably accommodating of development proposals and capable of processing them in a timely fashion, within the legal and procedural conditions relevant to CEQA requirements. For example, El Cerrito adopted a Specific Plan and programmatic Environmental Impact Report (EIR) for the San Pablo Avenue corridor which allows for three times the housing units allocated to the PDA and had two projects under construction in 2015 and several more in the pipeline. However, in some communities EIRs have been adopted that support only a fraction of the development physically possible under regulations in the Specific Plan or under supportable market conditions, presumably as a means of managing growth over time. In such instances, amendments to EIRs may be required to approach the true physical and regulatory capacity of the PDA.

PDAs with Specific Plans and programmatic EIRs allowing at least the number of units allocated to the PDA were not discounted; those PDAs with these documents in process or expected in the near-term (e.g., Fairfield West Texas and Livermore’s Isabel Avenue) were discounted on this criterion through 2020 only, meaning that incomplete or inconsistent planning documentation would not be an ongoing constraint for the period of 2020-2040. PDAs in cities where staff were unsure when a Specific Plan might be advanced (e.g., Pleasanton Hacienda) were discounted through 2030.

### Political and Community Support

Political circumstances also do not appear to be a major constraint in most of the PDAs evaluated. This is not surprising, since jurisdictions that nominate PDAs must consider and support the intensification of these self-identified locations within their communities. In many

cases, elected officials and community stakeholders have been supportive of actual development project applications – not just planning efforts – that are consistent with the PDA designations.

Still, there have been some political challenges for housing developers in recent years that affect the ability to deliver new units. Ballot initiatives such as San Francisco's limits on high-rise development along the waterfront (Proposition B in 2014) have scuttled projects that have otherwise been advanced by elected officials. Several communities have increased requirements for community benefits to be funded by housing developments, including Berkeley's recent requirement that Downtown high-rises contribute funds or in-kind benefits worth \$100 or more per square foot for space above 70 feet in height, in addition to the standard affordable housing requirements and other impact fees. Emeryville's City Council recently rejected a project (Marketplace) previously approved by the Planning Commission because the Council sought more affordable housing and larger (3-bedroom) units than the developer proposed. In Oakland and San Francisco, projects have faced scrutiny regarding their perceived impacts of gentrification and displacement, with an approved project in Oakland (12<sup>th</sup> Street at Lake Merritt Boulevard) being revoked due to political pressure and a ballot initiative for a moratorium on new market-rate housing in San Francisco's Mission neighborhood planned for November 2015. Ongoing fiscal concerns have also driven some development decisions, such as San Jose's various policies linking the pace of housing development to job growth in an effort to achieve greater jobs/housing balance and fiscal sustainability, and Hayward's disapproval of a planned downtown townhome development (the former Mervyn's headquarters site) in hopes that the site might be used for commercial purposes.

Even in these and other contentious jurisdictions, several political issues have become more favorable for housing in recent years. Selected examples include: the Mayor of San Francisco's push for more local funding for affordable housing and initiative to aggressively use surplus public land for new housing development; the San Francisco voters' approval of the Pier 70 redevelopment project, including 1,000 new homes; Hayward's independent market and feasibility analysis for the Mervyn's site (indicating limited viability of commercial uses) and subsequent consideration of an even higher-density housing proposal than was previously rejected; and Alameda's approval of several new higher-density housing projects (Del Monte, Alameda Point Site A) after many years of resistance and even legal prohibition (through Measure A) of new market-rate multifamily development.

Political conditions are obviously dynamic, and support for projects consistent with *Plan Bay Area* is likely to change over time based on general trends (e.g., Is traffic worsening? Are prices escalating rapidly?) as well as the specific characteristics of any proposed project. In sum, EPS has discounted development readiness in this category for only a few of the PDAs in the sample. It is important to note that, to the extent that some of these same issues affect construction feasibility due to increased costs placed on new development for community benefits, we have shown discounts in the "market attractiveness" criteria.

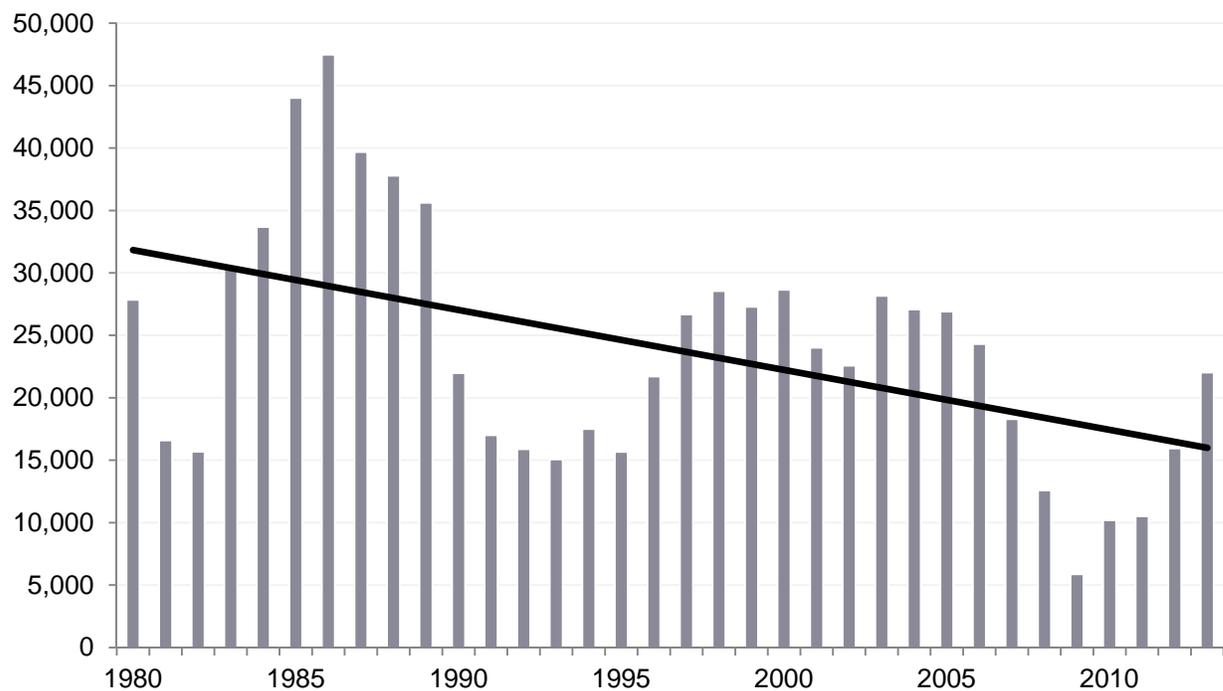
### **Market and Feasibility Issues**

Market conditions vary widely among the PDAs evaluated. Some PDAs are very high-demand areas with high housing prices and a history of intensified development occurring along transit corridors and near transit stations. Others face low market demand and conditions that discourage private investment. Policy intervention has proven only so effective in addressing discouraging market factors, though continued efforts to improve quality-of-life factors such as

crime, schools, and environmental conditions should continue to be a high priority.<sup>4</sup> Many of the PDAs face a shared challenge—redeveloping small, developed parcels in an infill setting. The state’s redevelopment agencies have traditionally provided tools and resources to address the complexity and cost of such redevelopment, but such resources are not currently available. Details regarding specific PDAs’ market conditions are provided in Appendix A, but the following discussion summarizes some general trends reflected in the readiness assessment.

**Figure 11** demonstrates that housing permits have increased substantially since the nadir of the recent Recession. However, this data indicates that the pace of housing production has generally slowed over the past several decades, which EPS believes reflects increasing challenges in receiving approvals for feasible projects, as well as a general diminution of the supply of developable land. To accommodate the forecast housing growth in *Plan Bay Area*, the region will need to add roughly 22,000 units per year between 2010 and 2040, nearly the average number permitted between 1980 and 2010 (24,700 per year), but on a diminishing supply of land. This trend speaks to the need to intensify urban areas as suggested in *Plan Bay Area*.

**Figure 11 Bay Area Housing Permits by Year**

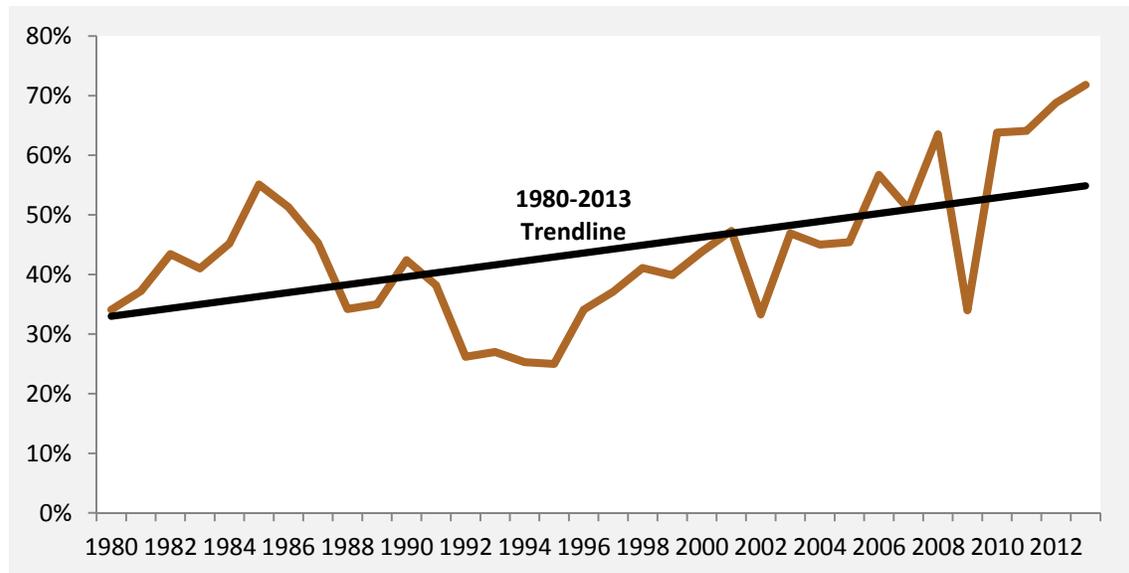


Source: Vital Signs, MTC

<sup>4</sup> Residential location decisions and financial investment decisions by both real estate professionals and consumers are complex. Studies have shown that lower crime, better schools, and improved environmental conditions are positively correlated with higher home prices—a key measure of housing demand. However, this study did not aim to provide specific recommendations to address the full spectrum of urban conditions that affect development opportunities and demand, and these three issues (crime, schools, and environmental conditions) are addressed qualitatively as potential constraints in certain locations without being the focus of policy actions recommended in this report.

**Figure 12** shows that the character of new housing in the Bay Area has shifted toward multifamily construction types. As illustrated, the proportion of multifamily housing permits as a percentage of all permits has climbed over time, even as the total number of permits issued has diminished (**Figure 11**). This trend suggests an increasing market interest – among housing builders, investors, and consumers – for higher-density development. This trend also supports the *Plan Bay Area* assumption that future growth will be more dense than past development patterns.

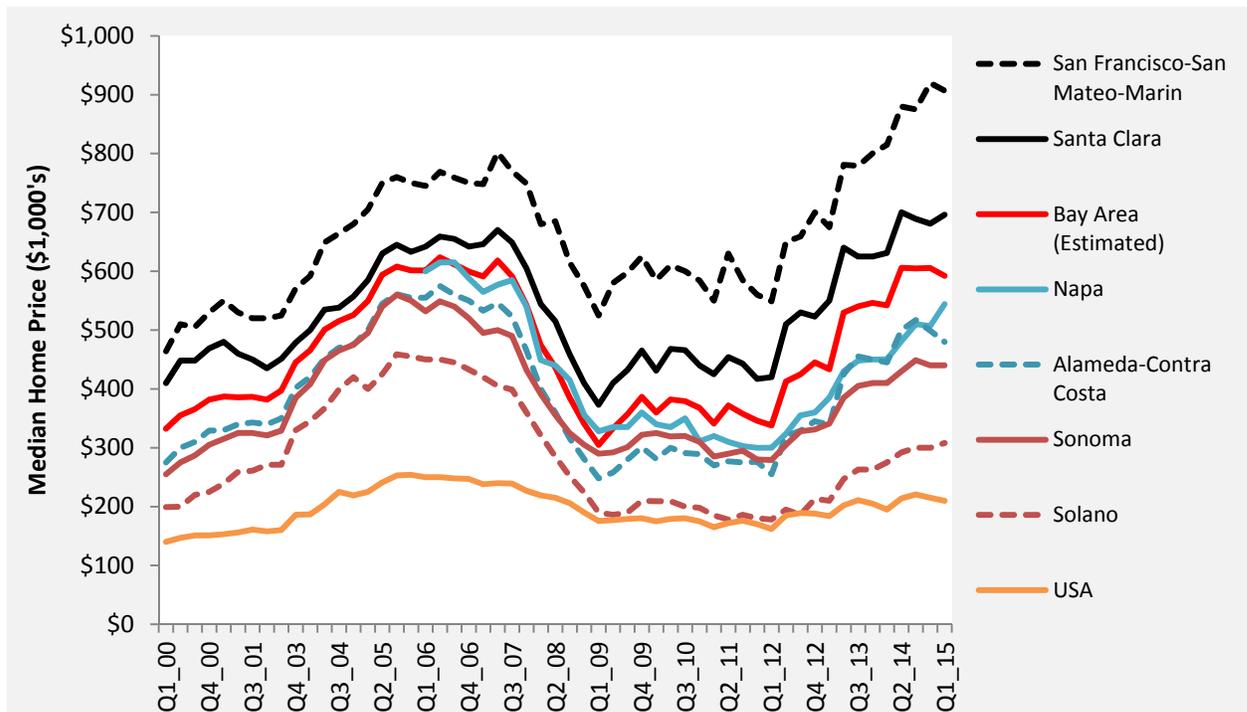
**Figure 12 Bay Area Historical Housing Permits: Multifamily as Percent of Total**



Source: *Vital Signs, MTC*

Home prices and rents have escalated quickly and are again at their all-time high regionally, as demonstrated on **Figure 13**. However, that figure illustrates that home prices vary significantly by location, with the median price in San Francisco-San Mateo-Marín counties being roughly double the price in Alameda-Contra Costa counties and triple the price in Solano County.

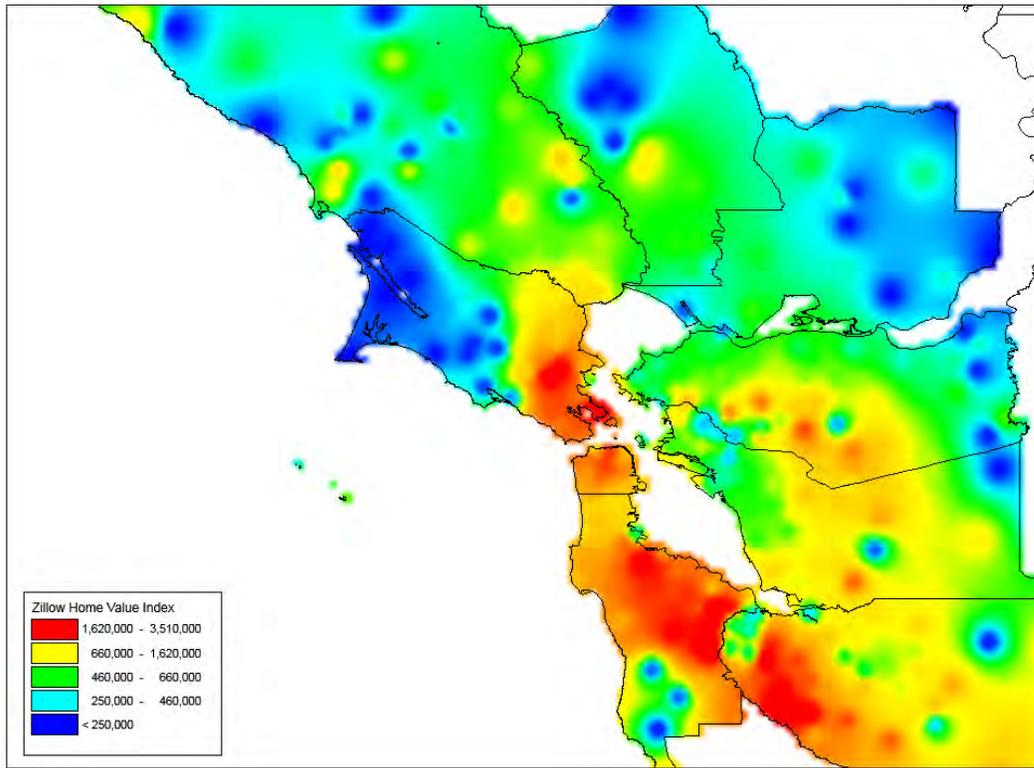
**Figure 13 Median Home Prices, San Francisco Bay Area**



Source: National Association of Home Builders Opportunity Index

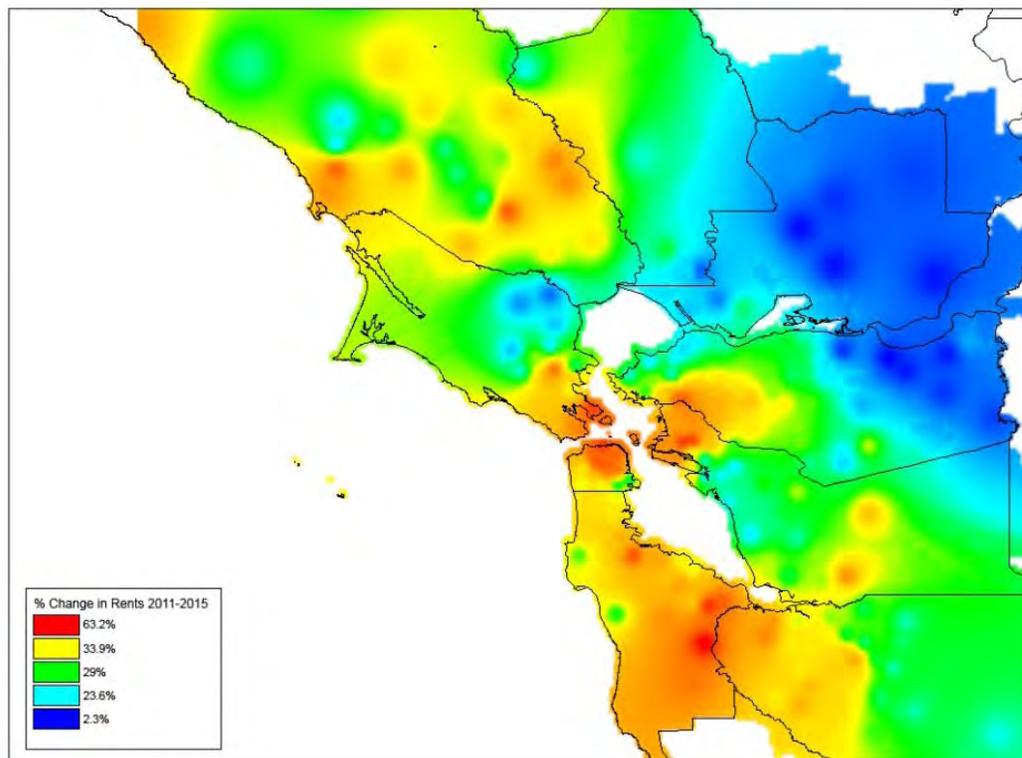
**Figures 14 and 15** further illustrate these geographic differences through two metrics: the prices of ownership units and the recent changes in apartment rents. As shown, places with high home values also generally have been undergoing the most rapid escalation in rents. These are areas like San Francisco, the Peninsula/Silicon Valley, and the Highway 24 corridor from Oakland/Berkeley to Walnut Creek – communities in which market forces appear strong and housing development is likely to be most financially feasible, notwithstanding any jurisdictional differences in land values, impact fees, etc. By contrast, the areas with lower prices and slower rent escalation – such as Eastern Contra Costa County and Solano County – will face greater feasibility hurdles for otherwise equivalent product types. In these lower-value communities, only lower-cost construction types – such as single-family homes, townhomes, and low-rise surface-parked apartments – are likely to be feasible in the foreseeable future, thus limiting the achievable densities in these areas. Even in some higher-value areas like Downtown Oakland, EPS has discounted the readiness of the PDA to reach its stated capacity if that capacity is predicated on most or all new development being mid- to high-rise buildings, as history and analysis show that low-rise projects (with structured parking) tend to be more feasible and are likely to proceed on certain parcels in the near-term.

Figure 14 Home Values, 2<sup>nd</sup> Quarter 2015



Source: Zillow.com

Figure 15 Change in Average Rents, 2011 to 2015



Source: RealAnswers.com

The conditions for housing development are quite different in the Bay Area and coastal California than in much of the country. "Hard costs" for construction materials and labor tend to be significantly higher; RS Means (an industry standard provider of comparative development cost estimates for various types of projects and across regions) reports that these construction costs for 3-story apartments tend to be roughly 50 percent higher in San Francisco, Berkeley, or Santa Rosa than in Dallas or Phoenix. In addition, "soft costs" such as entitlement costs (environmental clearance and project approvals), impact fees, and similar expenses tend to be significantly higher in the Bay Area. In EPS's experience working with private developers, it is not unusual for these soft costs to be 35 or 40 percent of "hard" costs for Bay Area projects, while they may be as little as 15 or 20 percent of hard costs in places such as Arizona or Texas. In part, these differences are the result of limited municipal resources due to California's Prop 13 taxing limits, whereas cities elsewhere charge proportionately higher property taxes and can fund more municipal services and facilities directly rather than through charges on new development. These differences explain why developers in other regions can offer newly constructed homes at a fraction of the price of a similar home in the Bay Area, but also point to economic constraints on housing development in and outside of PDAs and the potential effectiveness of efforts that can contain costs and make projects more feasible in Bay Area places with more modest market pricing.

The market and feasibility discount section considers past and current market conditions, near-term market indicators (e.g., development pipeline), and the impact of high-cost physical constraints (e.g., small parcels and existing uses), if present. Discounts were applied to reflect: PDA market conditions weaker than the Bay Area average; PDAs where the current development pipeline is minimal or represents a very small portion of the PDA housing growth allocation; PDAs with major disincentives present (e.g., environmental hazard, crime, etc.); and PDAs in which many opportunity sites had physical constraints like small parcels and existing uses.

The overall discounting related to market conditions shows: (1) PDAs in strong markets in San Francisco, Santa Clara, San Mateo counties and other areas are typically discounted for constrained physical conditions; (2) PDAs in weaker markets in the north and east bay are discounted to indicate uncertainty as to when price points increase to a level sufficient to support multifamily development, and (3) PDAs in moderate to strong markets which rely in part on expensive construction types (steel high-rises or podium product types) to achieve the PDA allocation were discounted, to the extent that significant pricing increases were required to justify the expensive construction types.

Market conditions and feasibility issues represent the major constraint in many PDAs. While these types of constraints on development are difficult to influence, the final chapter of this report includes actions to potentially improve market prospects for some PDAs (mostly aimed at the physical constraints affecting financial feasibility).

### **Infrastructure Quality and Capacity**

Infrastructure quality and capacity also varies widely among PDAs, with some requiring very limited new facilities to accommodate their allocated growth while others require extensive and expensive investments. In locations where infrastructure needs are high *and* market demands/achievable pricing are low, financing of improvements is especially problematic.

In reviewing these infrastructure needs with City staff members, EPS focused the analysis on infrastructure needs without identified funding sources. PDAs with modest infrastructure needs and/or where financing plans and funding sources were identified (typically development impact fees) and appeared to be supportable based on market housing values typically did not receive a discount in the readiness assessment. For those PDAs with moderate infrastructure needs but without financing plans (impact fee programs, Community Facilities Districts, etc.), short-term discounts were applied assuming that such plans could be formulated within a few years, provided that staff did not expect major infrastructure needs arising which could not be funded through private (development-based), local, and expected regional sources. Significant discounts were applied in the "baseline" scenario to PDAs with major infrastructure issues – for example, required environmental clean-up in the South Richmond PDA, the need for new schools in Fremont (while the State's funding for new schools is currently uncertain), a bridge over the Petaluma River in Petaluma, and entirely new roads and utilities in the Concord Reuse Area PDA. In the "amended" scenarios, these discounts typically are diminished, assuming that external funding sources could assist in addressing these infrastructure deficiencies at some point in the next 25 years.

A few PDAs face specific transportation infrastructure needs that go well beyond what is typically funded locally or through contributions from private development. Examples of these PDAs include Petaluma (bridge over the river), Livermore: Isabel Avenue (BART extension), Santa Clara Station Focus Area (also BART extension), and American Canyon (widening of Highway 29). These projects will need to be fully funded, or evaluated for inclusion in Plan Bay Area updates. In the case of the Santa Clara BART extension, which is already included as a planned expenditure in *Plan Bay Area* and thus assumed to be in effect in the amended scenario for that PDA, the limited amount of developable land in this PDA mutes the expected impact of this improvement on housing growth. For Petaluma, a new bridge would be expected to significantly increase the amount of accessible and developable land, so a major improvement to the PDA's housing growth is shown under the amended scenario. The impact of the other two identified major transportation improvements on development readiness (East Livermore BART and Highway 29) is more conservatively estimated in this analysis, as growth is expected in these two areas with or without these improvements.

Infrastructure issues are a key constraint for numerous PDAs. Removing this barrier to development in the PDAs will require public-private partnerships and outside funding from regional, state, and federal sources.

### **Summary Findings**

In sum, EPS has estimated that the 65 PDAs are "ready" to accommodate 70 percent of the housing growth allocated to them in *Plan Bay Area*. This figure represents the "base" readiness, assuming that current conditions are only improved marginally by efforts known to already have been considered by the cities (for example, upzoning for increased capacity where such has been publicly contemplated if not yet completed).

EPS believes the "readiness" of the 65 PDAs can be improved to 87 percent of their *Plan Bay Area* allocated growth through a combination of actions at the local, regional, state and federal. These and other potential planning and policy interventions are described in **Chapter 5** of this report.

### 3. *READINESS OF NON-PRIORITY DEVELOPMENT AREA LOCATIONS*

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While *Plan Bay Area* allocates most of the future housing growth in the region to Priority Development Areas, roughly 20 percent of the future housing is still assumed to be developed outside the PDAs. Moreover, it is appropriate to consider whether more housing development could more easily or feasibly be provided in non-PDA areas, given the variety of constraints identified in the analysis of 65 sample PDAs. This section of the report summarizes some of the opportunities and constraints pertaining to growth in non-PDA areas.

By definition, PDAs are designated by their jurisdictions as places well-served by transportation services and offering opportunities for mixed-use development at higher densities than are typical elsewhere in the Bay Area. The PDAs represent places that the jurisdictions themselves – who ultimately control land use regulations and project approvals – hope and intend for new construction to be concentrated. The PDAs, in aggregate, represent a very small portion of the land mass of the Bay Area (roughly 5 percent), leaving many other areas as “non-PDAs.” However, much of the region outside of PDAs is controlled by open space entities (such as the East Bay Regional Parks District’s 119,000 acres) or otherwise policy-protected through growth management measures such as urban growth boundaries adopted by cities and counties.

While PDAs are diverse but share certain characteristics, non-PDA areas are even more remarkably diverse. Examples of non-PDA areas include East Contra Costa County’s expanses of potential greenfield subdivisions, Palo Alto’s established residential neighborhoods, and Marin and Sonoma Counties’ coastal areas. As highlighted below, these areas face many of the same challenges present in PDAs, plus other challenges that are not as prominent in most PDAs.

#### **Development Prospects and Constraints in Non-PDAs**

##### **Planned Capacity and Policy Constraints**

EPS and CD+A have explored the planned capacity of each of the 65 PDAs in our sample by reviewing existing plans and identifying opportunity sites to which prevailing development regulations were applied. Non-PDAs also have finite growth potential based on physical constraints and planning regulations. Overall, capacity for substantial suburban density residential development in the Bay Area is limited to a finite number of areas given existing land use patterns and urban growth policies adopted by the counties and cities.

However, these more peripheral areas face a number of environmental and regulatory constraints that will limit their ability to accommodate future housing growth. **Figure 16** shows the entire nine-county Bay Area, and identifies all 169 PDAs as well as lands subject to a variety of constraints including:

- **Publicly-Owned Land** – National Parks, regional parks, and other lands held in public ownership in perpetuity

- **Physically-Constrained Land** – lands that feature riparian corridors, floodplains, hillsides/steep slopes, critical habitats for protected wildlife, and other constraints on the usefulness of the land for development
- **Policy-Constrained Land** – lands that are currently identified as Priority Conservation Areas or greenbelt reserves by local jurisdictions, subject to Williamson Act or other limitations due to their current use as agriculture or grazing lands.

As shown, outside of the PDAs and other parts of the Bay Area that are already largely urbanized, vast amounts of land are subject to one or more of the constraint categories described above. While some of these conditions are not permanent – for example, greenfield development often occurs on land previously used for grazing or farming – they do represent existing conditions or policies constraining development in non-PDA areas.

Many of these growth constraints are imposed as a result of local policy actions. For example, the combined residential growth capacity in Eastern Contra Costa County (Pittsburg, Bay Point, Antioch, Oakley, and Brentwood, and Discovery Bay) under current regulations sums to roughly 40,000 units.<sup>5</sup> While this capacity figure is certainly significant, these same communities added roughly 25,000 new housing units between 1990 and 2010, suggesting that even if long-term absorption rates continue without significant change, the area will approach full buildout by 2040. To limit the impact of new housing development on its facilities and services, Antioch has enacted a growth management policy limiting residential growth to an average of 600 units per year.<sup>6</sup> While 600 units per year would still result in substantial increases in Antioch's housing stock, its Growth Management policy does represent a somewhat reduced pace of growth for the City than occurred between 1980-2010 (averaged 636 housing permits per year).

Another non-PDA example is Coyote Valley, in southern San Jose. This expansive area has been held in reserve for several decades, awaiting market forces that would enable the development of the City's stated goals of having 25,000 homes and 50,000 "industry-driving" jobs. Achieving these quantified goals would require average residential densities of roughly 30 units per acre—a high average density for essentially greenfield development.<sup>7</sup> In addition, to meet City-established development conditions for the area, Coyote Valley development must not have a negative fiscal impact on the city, and all infrastructure and facilities must be fully funded by the development. These conditions significantly add to the cost to develop the area, and reflect the City's concerns regarding the financial sustainability of new greenfield development. Beyond these City stipulations, stakeholders have raised numerous concerns about traffic, air quality, water quality, cultural resources, affordable housing, healthcare facilities, wildlife habitat, farmland preservation, and similar environmental and social issues. These issues and challenges

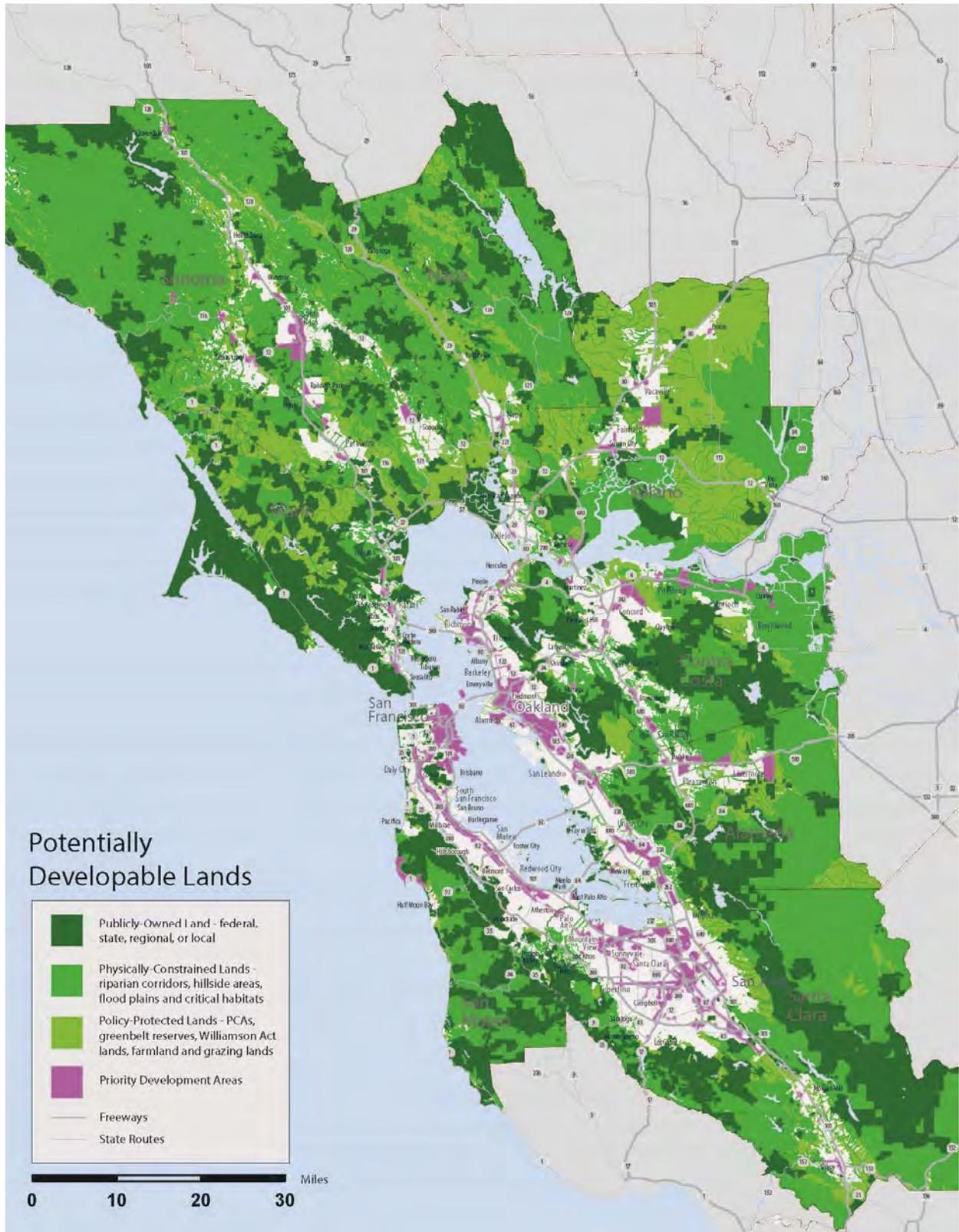
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<sup>5</sup> EPS has been working for the Contra Costa County Transportation Authority on planning and economic issues, and generated this figure through reviews of General Plans from the named communities.

<sup>6</sup> Exceptions to this policy include new housing developments in the City's PDAs (Rivertown and Hillcrest, evaluated in this Readiness analysis), income-restricted housing, and Special Needs housing.

<sup>7</sup> EPS was the urban economics firm employed by the City for the creation of the Coyote Valley Specific Plan from roughly 2003-2008.

Figure 16 Public Ownership, Physical and Policy-Based Constraints on Land



Source: Derived from Maps 2 and 3 in *Plan Bay Area*, with PDAs added

are typical of efforts to develop housing where facilities and services do not yet exist. By contrast, development in most PDAs benefits from some level of existing infrastructure and services, even if these are not fully adequate to accommodate the allocated growth.

In the Tri-Valley, developers were exploring a 1,900-unit housing development on 1,650 acres of greenfield land in Doolan Canyon. However, in 2014 the voters of Dublin overwhelmingly rejected Measure T, a developer-sponsored ballot measure that would have allowed the City to extend its Urban Growth Boundary to allow the canyon's future development. A coalition of environmental organizations opposed the development due to the presence of endangered and threatened species as well as its perceived importance as a green "buffer" between the urbanized areas of Dublin and Livermore.

Other non-PDA areas such as rural development beyond growth limit lines, or infill development within non-PDA built neighborhoods, are not expected to represent a major supply of future housing. However, the latter category – established neighborhoods – could potentially accommodate new housing if certain current regulations are relaxed by local jurisdictions. Most established areas already have existing lot patterns, so marginally reducing the minimum lot sizes (say, from 8,000 to 5,000 square feet) may not be a particularly productive approach. By contrast, allowing or encouraging second units within existing lot patterns may yield better results. Property owners could elect to turn underutilized space in their yard or garage into a small housing unit, thereby generating more income for themselves and providing another unit for the region. Certainly, not every property owner would elect to do this, but a policy and procedural shift that encourages second units (as found in some Bay Area jurisdictions) could materially enhance the capacity for housing in many areas already served by infrastructure and near job centers, similar to the goals of the PDAs.

### **Market and Feasibility Constraints**

There will always be a market for suburban and rural single family housing in the Bay Area, including resale of the substantial existing inventory and modest expansion in response to market demands. However, the recent housing "bust" has shown that peripheral suburban areas have been quicker to lose their home values and slower to recover than the interior areas nearer major employment centers and transit networks. EPS expects consumer preferences to follow recent trends, increasingly favoring urban and/or transit-accessible areas as population, employment, and related congestion increase.

By way of illustration, **Figure 13** in **Chapter 2** shows that Napa, Solano, and Sonoma Counties' median home prices have not yet recovered to the high points of 2006-2007, while San Francisco, San Mateo, and Santa Clara County home prices are not only much higher than in those more rural counties but also are now at all-time highs.

**Figures 14 and 15**, earlier in this report, illustrate these pricing trends more geographically, indicating that in general the places with the highest home prices have also had the fastest increase in rents, and that the non-PDA areas with the most obvious physical capacity (e.g., Eastern Contra Costa County and Solano County) lag the interior Bay Area in these critical market indicators. These figures illustrate the lower home values in peripheral locations requiring long commutes, and the relative stability and even growth of home values in more transit-friendly locations nearer employment centers. To the considerable extent that non-PDA areas represent housing options that are not well connected to transportation services and

employment, EPS anticipates that achievable home prices will remain substantially lower, posing feasibility challenges even for the less costly (per square foot) single-family product types typical of suburban areas.

Similarly, the interior Bay Area where *Plan Bay Area* concentrates most growth has shown increased interest in multifamily housing. As previously illustrated on **Figure 11**, multifamily housing has represented an increasing proportion of all new Bay Area housing permits over the past several decades. According to the California Department of Finance (DOF), Santa Clara County—the Bay Area’s most populous county and the expected location of roughly one-third of all new housing units allocated in *Plan Bay Area*—realized a 13.0 percent increase in multifamily housing units between 2000 and 2010, compared to a 7.8 percent increase in single-family units. Alameda County is allocated the second-most units in *Plan Bay Area*, and its multifamily housing stock also grew more quickly than its single-family stock (8.3 vs. 7.4 percent). These trends illustrate that higher-density housing has been prioritized by the market in *Plan Bay Area*’s expected growth areas – a trend that will be critical to the success of *Plan Bay Area*, but that also indicates a continuing shift in consumer preferences.

Indeed, a study by the Urban Land Institute (ULI) released in October 2015 indicates that Bay Area residents have much more interest in urban lifestyles than their national counterparts, including those in other similarly sized metropolitan regions. Due in part to affordability concerns but also reflecting lifestyle choices, a higher proportion of Bay Area residents expect to live in apartments in five years and fewer than half of Bay Area respondents cite having private yard space as a top priority – a lower percentage than those who cite convenient transit as a high priority. The ULI report concludes that neighborhoods offering convenient alternatives to the automobile for mobility – such as PDAs – will have significant marketing advantages in the coming decades.<sup>8</sup>

Even with price points and production data suggesting increased market preferences for interior locations and multifamily product types, many households—especially families with children—will continue to seek single-family homes. Development in non-PDA areas will be critical to meeting this ongoing demand for less urban housing options. But with households with children representing only one-third of all households in the Bay Area in the 2010 Census, a substantial existing stock of single family homes (1.75 million in 2010 throughout the nine Bay Area Counties), evident consumer shifts toward higher-density product types in high-growth areas, and the continuing effects of the Great Recession (both in home supply and lending practices) demand for new single-family units in non-PDA areas is likely to be less instrumental to future regional growth than it has been in the past.

### **Infrastructure and Financing Constraints**

Non-PDA areas in suburban or peripheral settings typically have less existing infrastructure to accommodate new growth, and new suburban subdivisions frequently have carried significant costs to install new roadways, utility extensions, parks, schools, etc. The Coyote Valley example cited above illustrates this point. Greenfield development typically requires housing developers and/or consumers to contribute to a variety of facilities and even municipal services. These

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<sup>8</sup> <http://urbanland.uli.org/news/uli-report-bay-area-risk-losing-millennials-due-housing-costs-quality-life-concerns/>

costs, paired with comparatively low home values in some areas with greater planned “greenfield” capacity, represent a financing obstacle for new subdivision development. For example, new single family development in the northeast area of the City of Fairfield is required to pay between \$65,000 and \$80,000 per unit (depending on density) for backbone infrastructure and public facilities in addition to the costs for in-tract streets and local utilities.<sup>9</sup> These figures represent a significant proportion of the potential value of new homes in this location, thus posing a feasibility challenge.

For another example, the Hillcrest Station Area in Antioch—which is actually a PDA but is similar to many greenfield subdivision projects in terms of location and infrastructure needs—requires an estimated \$140 million in infrastructure costs to support 2,500 housing units—an average of nearly \$60,000 per unit in an area where townhome prices may be expected to be below \$250,000 for the foreseeable future.<sup>10</sup> This infrastructure cost ratio represents a significant burden and feasibility challenge for new development.

Affordable housing is also more difficult to achieve in non-PDA areas. The federal Low Income Housing Tax Credit program is a major source of funding for low-, very low-, and extremely low-income housing. The program prioritizes development of rental housing (typically found in multifamily prototypes) and grants competitive preference to projects near urban services such as transit, healthcare facilities, schools, etc. Suburban greenfield development often does not provide these competitive advantages, thus constraining the ability for affordable projects in such areas to compete for these critical financial resources.

## Summary Regarding Non-PDA Development Prospects

EPS recognizes that market, political, physical, regulatory, and infrastructure conditions will vary significantly among the non-PDA areas. Given the expectations that single-family homes will continue to be in demand and that residential land will continue to be available in non-PDAs, EPS concludes that it is appropriate that non-PDA areas be assumed to continue to grow and be available as a source of residential property in *Plan Bay Area*. But given the constraints in non-PDA areas and evidence of increasing market preferences for the Bay Area’s urban and transit-served areas, *Plan Bay Area’s* forecast that allocates the majority of future housing (and regional funding) to PDAs is likely to be most appropriate as both a projection of market-driven outcomes and as a policy basis for land use patterns and transportation investments that enhance sustainability goals and reduce greenhouse gases.

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<sup>9</sup> EPS was the City of Fairfield’s economic consultant for the Fairfield Train Station Specific Plan.

<sup>10</sup> EPS was the City’s economic consultant for Antioch’s Hillcrest Station Area Specific Plan Financing Plan.

## 4. POLICY ACTIONS TO IMPROVE DEVELOPMENT READINESS

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The following policy recommendations reflect the views of EPS, and do not necessarily represent those of MTC or ABAG.

### The Need for Policy Actions

The Readiness Assessment has revealed a wide range of constraints among the 65 PDAs surveyed, as each has its own unique physical, regulatory, political, and market circumstances. Despite this diversity, there are several constraints that are common to many if not all PDAs, and may be effective focal areas for policy interventions at the local, regional, and state levels. The need for such actions is recognized in *Plan Bay Area*, as well as in the implementation framework established by MTC and ABAG to support the establishment of a *Priority Development Area Investment and Growth Strategy* by each Congestion Management Agency (CMA) in partnership with local jurisdictions to improve development readiness and implementation of the PDAs. The actions identified below are intended to inform and complement these former efforts, and to be incorporated into discussions regarding the path toward successful implementation of the regional plan.

As detailed in this report, six general factors affect development readiness:

- 1. Plans and Regulations.** While most PDAs in the sample analysis have land use plans and regulations consistent with *Plan Bay Area*, there is a need for continued innovation in all PDAs – new policies and forms of development regulation that achieve desired public purposes in ways that simultaneously improve incentives for, and reduce the risks of, private investment. In some cases, existing zoning and/or environmental regulations do not support the full allocation of housing, despite ample physical land capacity.
- 2. Political and Community Support.** Even when plans and regulations are supportive of housing growth, local officials have a role in approving individual projects. These approvals can be contentious when neighborhood stakeholders object, or when local officials must consider project approvals in the context of broader community objectives.
- 3. Market Demand.** Market demand for housing reflects regional and local supply and demand relationships, historical development patterns, and the preferences of buyers. Housing demand also fluctuates with market cycles that are affected by macroeconomic trends as well as local conditions. Consumer preferences for different types of housing, the availability of project financing and mortgages, the growth of core employment industries, and other factors are generally beyond the control of governments at any level. For this reason, EPS has not focused on interventions that can shift and drive market demand, other than infrastructure investments that can improve the environment’s attractiveness and convenience (generally addressed under “Infrastructure Capacity” below). Still, it is worth noting that the PDAs located where there are currently favorable market conditions and prospects typically will require less effort (application of additional policy actions) than those with weaker market prospects due to their outlying location or pervasive conditions that limit their market attractiveness and related pricing. Policy interventions and investments at the local or regional level can only partly address weak market demand; however, insofar as

policy actions reduce the cost and risk of new development in the PDAs, the development potential of PDAs with weak market conditions could be improved.

4. **Financial Feasibility.** Projects are feasible when the costs of development (acquiring land, securing entitlements, constructing buildings, and meeting other obligations) are exceeded by the value of the new construction. Where attenuated entitlement processes or discretionary requirements such as affordable housing, ground-floor commercial space, or community benefits add to the costs of development, the pace of housing production can be slowed as fewer households can afford to pay the prices required for project feasibility.
5. **Site Availability.** Most of the PDAs are largely developed and also exhibit a fragmented pattern of small parcels in independent ownership. Parcel assembly and redevelopment will be needed to achieve development objectives in virtually all PDAs. This land assembly process is time consuming, risky, and expensive and will thus represent one of the largest obstacles to achieving *Plan Bay Area* and local planning objectives.
6. **Infrastructure Capacity.** Most of the PDAs will require substantial new investment in infrastructure, which may include transportation improvements, water/wastewater upgrades, or even new schools. Other PDAs may have basic infrastructure in place, but could improve their attractiveness and convenience through pedestrian/bike improvements or other upgrades. In some instances, funding capacity from the local government or supportable amounts from housing developers is simply not adequate to pay for this infrastructure, thus regional, state or federal funding will be required to support desired PDA development.

While substantial constraints are apparent in many PDAs, it is important to recognize, as discussed earlier in this report, that the transformation of the Bay Area to a more urban and densely populated area is already well underway. This transformation is driven by demographic shifts, market preferences, and supportive local planning policies. The Great Recession has influenced these trends in a variety of ways (e.g., shifting demand to rental housing and toward interior Bay Area communities nearer job centers). Cities in the West and South Bay, benefitting more recently from robust employment growth and strong real estate market conditions and ongoing planning efforts, have overcome some of the PDA development constraints discussed above to initiate projects that contribute toward greater urban infill and intensification. But the overall process of such transformation, focusing the bulk of the region's future growth to existing urban areas, will unfold over the next three decades and beyond.

## Top Policy Recommendations

Based on the findings of this PDA Assessment Update, the discussion below provides a wide-ranging set of suggestions to enhance the viability of PDA housing development. This Readiness Assessment indicates that a number of conditions are shared among many PDAs, and EPS believes it is appropriate to concentrate on such common issues as actions are prioritized. While physical and zoning capacity is certainly an issue in some PDAs, overall the capacity appears to be adequate. However, the entitlement process can be very costly and risky, especially in the strongest market areas, and projects face feasibility challenges due to market conditions, added

“discretionary” project requirements, or inadequate infrastructure. EPS believes the top priorities for pursuit should include the following:<sup>11</sup>

- **Reinstating key parcel assembly powers and tax-based financing resources** – Under Redevelopment law in effect until 2012, many urban communities in California were able to take action that directly improved the prospects for infill housing development. Allowing local governments to direct more meaningful amounts of local tax increment funding to priority projects, beyond the limited amount likely to occur under Enhanced Infrastructure Financing Districts in most jurisdictions, as well as restoring the important ability to assemble sites in physically constrained areas can make substantial contributions to PDA housing growth. *Note: Near the completion of this report, AB 2 was signed into law, restoring some of the powers and financing capacity under previous Redevelopment law.*
- **Increasing funding for housing-supportive investments in PDAs** – In many Bay Area communities, housing developments are required to pay impact fees, provide community benefits, or otherwise bear costs for infrastructure and public services that significantly raise the costs of construction and arguably constrain the amount of new housing produced. Whether at the local, regional, State, or federal level, generating more financial resources shared by the broader constituency can help to reduce high costs for new construction, thus potentially enhancing the feasibility of housing development.
- **Working to change the anti-growth political environment** – Studying and communicating best practices for project design, regulation, and approval can make a substantial difference in achieving housing growth, particularly if paired with education regarding the expected conditions if housing is *not* accommodated within PDAs.

If successful, these efforts will help to address many of the constraints identified in this Readiness Assessment, and increase the likelihood of achieving Plan Bay Area housing growth projections.

The following sections provide a range of more specific actions that can be taken at the regional, local, state, and federal level to enhance the likeliness of achieving *Plan Bay Area's* PDA housing growth forecasts and, by extension, its environmental sustainability objectives.

## Primary Recommendations for Regional Agencies

The resources and actions presented in this section derive from suggestions made during this analysis through interviews with local agency staff and private developers, the experience of the EPS team with planning and implementing urban development projects, and implementation actions identified in *Plan Bay Area*. In this section, EPS has identified our primary recommendations for MTC and ABAG corresponding to the common PDA readiness constraints identified above. As these bodies are more responsible for establishing broad regional goals and distributing funds than for creating or implementing land use policy (still exercised at the local level), the following objectives and recommendations relate to ABAG and MTC's current roles.

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<sup>11</sup> As noted earlier, the policy recommendations herein reflect the views of EPS, and do not necessarily represent those of MTC or ABAG.

An overarching theme of these recommendations is a move to a more “development positive” posture. The growth management, planning, and environmental review policies of the past generation that focused on limiting new development are in need of fundamental reform at the local level. Whether in PDAs or outside PDAs, the development necessary to achieve housing growth as envisioned in *Plan Bay Area* is in most instances more challenging than in generations past, when regulatory and fiscal conditions posed less of a hurdle. Adding to the fundamental challenges of displacing existing uses, parcel assembly, and inadequate infrastructure, there are the continued institutional constraints and financial feasibility constraints that have resulted from the Great Recession, including the loss of redevelopment agency powers, continued challenging fiscal conditions in many of the Bay Area’s cities, and more challenging credit market conditions and persistently increasing development costs driven, in part, by new state mandates (e.g. residential fire sprinklers, “green” building standards, etc.). This new posture will need to include more streamlined and less discretionary land use regulations, further restraint on protracted environmental impact review and related litigation, and more public investment in the infrastructure needed to support desired PDA development and affordable housing.

The following recommendations are intended to contribute to this reform:

### **Planning, Research, and Education**

The MTC- and ABAG-sponsored PDA Planning Grant program, initiated in 2005 as the Station Area Planning Program in support of regional transit expansion and the region’s transit-oriented development policy, has been an extremely effective incentive for local planning activity. Over the past ten years MTC has funded 51 planning grants totaling nearly \$24 million.<sup>12</sup> The new plans and Environmental Impact Reports adopted by local governments as the result of the planning grants have created development capacity for over 60,000 housing units and workspace for 103,000 new jobs. Regional funding of local planning efforts is expected to continue as a part of *Plan Bay Area* implementation and will be especially important for PDAs without completed plans or those that need updating to maximize their relevance and potential (for example, plans that are more than 10 years old).

In addition to continuing financial support for the Specific Plans and Environmental Impact Reports that have been the major focus of previous planning grants to date, there are a range of technical studies and related technical support efforts that can be broadly applicable and effective as information for local officials or as they may contribute to regional solutions to the Bay Area’s housing needs. Examples of topics for such studies include the following:

- **Fiscal Impact Analysis.** Many communities resist approving housing developments because the conventional wisdom is that housing is a net negative on municipal revenues (i.e., demands services that cost more than the taxes and other revenues they generate), while employment uses or retail yield positive fiscal impacts. Some communities or academics that have studied this in detail have found results that are more nuanced, with the net effects being contingent upon the market values of new homes and their density and proximity to infrastructure and service providers. A comprehensive study exploring the

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<sup>12</sup> In addition to these planning efforts, MTC has funded 33 projects summing to \$1.8 million in the “Technical Assistance” and “Staffing Assistance” program, providing local governments opportunities for smaller efforts that can aid in transportation and land use matters.

physical, organizational, and market conditions that can yield positive fiscal benefits from housing may help to update the conventional wisdom, potentially leading to policy changes that relax phasing limits or other restrictions on housing growth.

- **Economic Impact Analysis.** Traditionally, most housing is thought of as a by-product of economic growth: as industries expand, so does the demand for housing. However, a lack of convenient and/or affordable housing has been noted by many industry organizations as a deterrent to employee retention and/or business expansion in the Bay Area. Also, without housing growth, it is difficult to grow the retail base that is often regarded as a driving factor for municipal revenues. A study that demonstrates the importance of housing development to the region's economic health may reveal that these are not "either/or" choices.
- **Revenue Sharing.** Related to the concerns regarding housing's fiscal impacts is the concern that one jurisdiction may serve as a "bedroom community" for another city's job base. To the extent that the fiscal trade-offs are real, it may be desirable to establish a model for inter-jurisdictional revenue-sharing so that net housing providers can benefit from their important regional role. A study exploring legal opportunities and constraints to establishing such inter-jurisdictional agreements or regional revenue sharing could facilitate dialogue among potential participants.
- **Site Availability and Assembly.** MTC is sponsoring a study of publicly owned properties in the West Bay to assess their viability for housing development, and to identify strategies to implement housing development on the most promising sites. In addition to this upcoming study and others that may follow, it may be valuable to explore best practices and opportunities to assemble private properties. With the demise of Redevelopment powers, many communities recognize that the disparate ownership and/or configurations of opportunity sites represent a major hurdle for achieving efficient and feasible housing development. Exploring organizational models, legal allowances and prohibitions, and potential funding sources to assist in site assembly can provide jurisdictions with ideas and tools to assist in this important precursor to readiness.
- **Entitlement Reform and Streamlining.** Despite being generally consistent with local plans, many projects face challenges in entitlement as they are subject to layers of review and approval. These steps add time and uncertainty to the entitlement process, and often result in added costs as details are negotiated. Jurisdictions that can effectively streamline the entitlement process by making housing a "use by right" or otherwise eliminating steps and uncertainty should be able to achieve more housing at lower potential price points. While officials and stakeholders are understandably reluctant to forego any opportunities to take action on a proposed project, there may be some approaches to streamlining entitlements in PDAs that represent reasonable compromises, particularly if they are paired with financial incentives (see below). Local jurisdictions could consider the results and recommendations of such a "best practices" study as they evaluate the effectiveness of their current policies and procedures as they relate to achieving development in PDAs. SB 375 and SB743 have both aimed to provide relief from otherwise applicable environmental review requirements to streamline the entitlement process for qualifying projects (typically, housing developments in PDA-type areas), but to date few projects appear to have taken advantage of these opportunities. MTC and ABAG could explore reasons why these approaches have not

been optimally effective, and work on educational efforts and/or legislative reform to enhance their viability.

- **Impact Fees and Community Benefits.** Developers report that impact fees and community benefits typically add tens of thousands of dollars to each housing unit's construction costs in many jurisdictions, significantly affecting the feasibility of new construction. While impact fees can be an efficient way of distributing and funding infrastructure and other community facilities, there may be ways of reducing impact fees within PDAs to incent development. In addition to general reductions or waivers for qualifying projects, it may be that standards used to calculate typical fees (e.g., trip generation rates) may be less appropriate in PDAs than in greenfield areas. SB 743 and SB 375 have encouraged alternative approaches to traffic impact modeling more reflective of PDA conditions, and could be explored as initial models for further refinement. Similarly, community benefits requirements—which sometimes are specific and other times are simply dollar amounts tied to no particular expected project impact – can be both expensive and unpredictable. Establishing incentive programs for community benefits – such as density bonuses in market areas where additional density is actually in demand and feasible – can be an attractive alternative to mandatory requirements. Exploration of these issues could yield lower costs and thus improve project feasibility in PDAs. Likewise, many jurisdictions seek information regarding their fee schedules compared to other jurisdictions as they consider raising fees individually or in aggregate, but such information consistently proves challenging to assemble and verify. A comprehensive study of impact fees regionally could indicate where each jurisdiction ranks and how their current schedules affect project feasibility, though the feasibility impacts of their fees will of course be affected by local market conditions.
- **Affordable Housing.** A substantial proportion of the population growth and housing need projected in Plan Bay Area is attributable to households that would qualify for affordable housing. After the demise of Redevelopment and its associated housing set-aside money, many have relied upon inclusionary zoning, in-lieu or impact fees, and/or commercial linkage fees on new development as a primary local source of funding. These programs that place cost burdens on new construction and thus diminish its feasibility could be augmented with other local resources that may distribute the costs of these community objectives more broadly. Potential examples include issuing housing bonds based on parcel and/or sales taxes, directing real estate transfer taxes toward housing programs, or utilizing public lands for housing. Also, regional or sub-regional solutions could be sought, such as allowing cities to collaboratively meet RHNA requirements (as currently practiced in Napa, San Mateo, and Solano Counties), or creating a regional housing trust fund. Studies of potential approaches to generating and sharing revenues could inform more efficient and productive approaches to this critical regional need.
- **Affordability by Design.** Many developers of both market-rate and affordable housing face pressure to include project features that increase development costs. Whether it be building materials, high parking ratios, programmed open space, or other features, these project elements can significantly increase development costs while perhaps not having a proportionate benefit to the project. A study exploring ways to reduce costs through construction methods, material selection, or reasonable adjustments to standard

requirements may inform developers and elected officials alike of ways to enhance project feasibility and thus housing production.

- **Stakeholder Engagement.** Developers and city representatives report that stakeholders ranging from neighborhood groups to unions to non-profit organizations frequently participate in the process of vetting development projects, and can add time, uncertainty, and costs. A study exploring more and less effective approaches to engaging these stakeholders – including establishing appropriate communication protocols, roles, and expectations as well as providing information on legal rights and limits and other design and procedural best practices as described above – may help to facilitate efficient and productive entitlement processes.

Through these types of technical studies, MTC and ABAG can advance jurisdictions' understanding of critical policy issues and improve the process and likelihood of entitling housing development.

### **Funding for Projects**

MTC has provided grants to support transit-oriented development since the 1990s. Program examples have included the One Bay Area Grant (OBAG) program, Transportation for Livable Communities (TLC) program, the Transit-Oriented Affordable Housing (TOAH) program, and projects in Resolution 3434, the region's transit expansion program, in addition to the planning grants discussed above. These programs have provided funding for a variety of projects and expenses, including inter-modal circulation improvements that support housing, site acquisition for affordable housing, and transit projects in areas with regulations that support housing intensification.

While MTC's funding sources cannot be used directly for housing construction, and may have other limitations based on program eligibility,<sup>13</sup> it is worth exploring the legality and viability of using funds for the following purposes:

- **Site Acquisition.** The TOAH program provides a revolving loan fund available to developers to assist in acquiring sites for new construction, as well as complementary loan products. As of June 2015, the TOAH program is slated for expansion to include additional dollars (increasing MTC's investment from \$10 million to \$20 million, leveraging another \$70 million of external funds) as well as new uses of funds (for pre-development work as well as site acquisition and improvement). This program allows for the acquisition of sites for affordable housing and also mixed-income projects that include market-rate units. The need for funding assistance may be particularly acute in infill corridors such as El Camino Real and San Pablo Avenue, where developers report challenges assembling efficient sites. Lower-cost capital for such acquisitions could facilitate more development by allowing developers to offer more competitive prices for the properties.
- **Housing Construction.** The Housing Incentive Program (HIP) that was part of the TLC program provided transportation funding to cities for local circulation and multi-modal improvements based on the number, density, and affordability of new units constructed

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<sup>13</sup> The TOAH program has successfully exchanged transportation funds with other local funds to support its program goals, but is an example of a program requiring

around transit facilities. Though the program was discontinued in its previous iteration – in part because the grants were deemed too small to effectively incent policy decisions that would not otherwise have been made – a similar but expanded program could be created that provides funding for housing production but allows the use of the funds toward offsetting either on- or off-site construction costs. Directing the funds to offset transportation or transit impact fees may be one viable use, where such fees are implemented.

- **Transportation Improvements.** MTC’s primary role is to allocate funding to transportation improvements and services. Through the One Bay Area Grant (OBAG) program and others, MTC has aimed to prioritize distribution of a modest share of transportation funds to PDAs and areas where the funded improvements can enhance the viability of housing construction. While it is appropriate to be prospective about these impacts to a certain extent, it may be equally or more productive to prioritize spending in areas where housing development is already being achieved. MTC’s OBAG program aims to do this, but the funds are actually distributed to county Congestion Management Authorities (CMAs) for local appropriations that do not necessarily conform to the program goals. A more directly linked approach that places more allocation specifications on CMAs could incent jurisdictions to actually approve housing developments in their PDAs.

These types of funding programs can close a portion of the feasibility gaps noted in this Readiness Assessment, if funded at adequate levels. The first round of OBAG funding distributed by CMAs to local jurisdictions summed to roughly \$330 million – a substantial figure but far below the full needs for PDA housing and infrastructure investments over this period and beyond, and thus not really providing the kind of financial incentive envisioned in SB-375. For comparison, the \$330 million figure could subsidize production of between 1,000 and 2,000 affordable housing units at prevailing construction costs – a major shortfall from the number of units required to meet policy objectives. MTC’s funding for the OBAG program is potentially diminishing – the second phase of OBAG funding is expected to be 3 percent lower than the first phase. Moreover, the OBAG funding comes from federal transportation dollars and represents only 6 percent of the total \$292 billion of projected costs of transportation improvements under *Plan Bay Area*. To the extent funds can be made available for the types of expenditures noted above, they will be more effective in approaching the region’s housing needs and the allocations of *Plan Bay Area*.

One potential source of regional money would be “Regional Measure 3,” a planned update to a previous regional funding program whereby bridge tolls have been dedicated to transportation improvements within “bridge corridors.” Such improvements have included both highway and mass transit projects – major expenses that cannot be feasibly carried by fees on new development alone.

At the same time, the amount of funding allocated by the CMAs from their other resources, such as their respective sales tax measure funding, vehicle license fees, or regional traffic impact fees, far exceed the OBAG grants. Over time, as these countywide funding sources are updated or reauthorized, they could be better aligned with regional planning objectives as reflected in *Plan Bay Area*. The *PDA Investment and Growth Strategies* adopted by each of the CMAs can provide an organizational framework for this effort beyond OBAG funding.

One potential way of leveraging the finite OBAG funds may be to match PDA-supportive local or sub-regional funding initiatives. When a CMA allocates its own discretionary funds to a project in

a PDA, MTC could match those funds through the OBAG Program with regional funding sources, thus multiplying their effectiveness. Likewise, if a jurisdiction establishes a local funding mechanism such as an Enhanced Infrastructure Financing District (EIFD) for infrastructure, affordable housing, or other allowable expenditures in PDAs, MTC could match those funds. Such an approach may be more effective in compelling local investment in PDAs than simply providing the funds to CMAs and hoping they are used for PDA investments.

In combination with the recommendations for local governments discussed below, these suggestions for regional funding priorities can advance state-of-the-art policies and accelerate housing production at the local level.

## **Local Resources and Actions**

Local governments have discretion over their local land use policy and regulation and have primary responsibility for building and maintaining major infrastructure serving PDAs (i.e., local roads, parks, sewers, etc.). Thus, they will have the primary responsibility for implementing *Plan Bay Area* by creating local land use policies and making public investments that attract the private investment necessary to ultimately draw both residents and businesses to the PDAs.

### **1. Adopting or expanding innovative land use regulations**

The PDA Assessment Update has found, with a few notable exceptions that the PDAs surveyed had completed plans and rezoning in their PDAs which are generally consistent with the *Plan Bay Area* housing and employment objectives. This is no surprise as local jurisdictions nominated their PDAs as areas of opportunity for future growth. A number of planning and regulatory innovations in recent years have improved the flexibility, predictability, and efficiency of land use regulations. Examples of these innovations include “use-by-right” zoning districts that promote certainty for developers by clearly establishing non-discretionary use rights, form-based zoning codes that focus on the physical form of buildings instead of specific uses or density, and “incentive-based zoning” that exchanges increases in allowed density for investments in public improvements and amenities. Local jurisdictions will need to review their current regulations to determine how such innovations may improve development readiness and related private investment.

In addition, zoning requirements related to parking should be considered as part of an overall parking management program. Those PDAs with more extensive transit service should consider opportunities to reduce parking requirements without adversely affecting local traffic congestion. If supported by market preferences, this strategy can also substantially reduce the costs of new housing construction, as each structured parking space can cost tens of thousands of dollars. Centralized community parking – rather than having parking within each individual project – has also proven acceptable in certain urban areas, and may be useful where parcels are constrained and parking layouts are inefficient.

Both within and outside PDAs, regulations allowing or encouraging accessory dwelling units can increase housing capacity. Whether converting existing garage space to living space or constructing a second unit in a backyard, such units could add significantly to an area’s buildout potential and provide extra income for property owners while maintaining the general character of a neighborhood.

**2. Establishing and maintaining Program EIRs for all PDAs**

Under existing provisions of the California Environmental Quality Act (CEQA), a Program Environmental Impact Report (PEIR) allows for disclosure of potential environmental impacts and identifies mitigation measures, consistent with CEQA requirements, for an entire planning area (such as a PDA). As such, a PEIR can reduce the scope and depth of subsequent environmental review for projects developed pursuant to and consistent with the area plan, which can lead to more certainty for developers and reduced costs for development. The Development Readiness Assessment found that a number of cities have completed such PEIRs as part of their specific planning efforts. A number of these plans have been supported by the MTC-funded PDA Planning Program, which includes funding for PEIRs. Reducing the cost and risks associated with project-related environmental review, while achieving the basic objectives of CEQA, is an important way local governments can improve certainty and feasibility of desired new development. This recommendation would be most effective if paired with State law that reduces the need for duplicative environmental reviews (see below). In addition, it may be advisable to review and update these PEIRs over time (say, every 10 years), to protect against claims that assumptions or baseline conditions are outdated.

**3. Developing PDA-specific capital improvement programs**

Cities and counties include Capital Improvement Programs (CIPs) as a part of their normal budget process. These CIPs normally include a list of capital improvements planned for construction over the next five years. Given the specific needs of PDA infrastructure, it would be helpful to create PDA-specific capital improvement programs, which could then be integrated into the City's overall CIP and prioritized according to local standards. Many PDAs have already done this as a part of their specific planning efforts – establishing an infrastructure improvement program and related financing and phasing plans. These will improve the “shovel readiness” of major improvements and put the local agency in a better position to obtain federal, state and regional funding. The PDA Investment and Growth Strategies prepared by the individual Congestion Management Agencies (CMAs) in the Bay Area focus on this issue.

**4. Establishing a comprehensive financing plan for each PDA**

Similar to area-specific CIPs, many cities have created financing plans for their PDAs as part of their Specific Plans. In other cases, where there has not been such a planning effort, there is no overall plan for financing needed infrastructure other than that afforded by city-wide programs (development impact fees, etc.). In addition to organizing the CIP, a financing plan can identify and link funding sources, determine net funding needs, and institute special funding mechanisms as may be required such as local area development impact fees or Mello-Roos Community Facility Districts. The financing plan can also evaluate whether the financial burdens associated with infrastructure financing, affordable housing, and other development mitigation or community benefits fall within reasonable economic limits and thus do not deter desired development.

**5. Using RDA “Boomerang” funds for PDA projects**

With the dissolution of Redevelopment and its associated tax increment financing and allocation programs, cities and counties are now receiving tax revenues that had previously been dedicated to Redevelopment Area projects. Some communities – including the City of Oakland and Counties of San Mateo and Santa Clara – have taken action to ensure that some

or all of these so-called “boomerang” funds are being used to further the previous goals of Redevelopment, by directing them toward affordable housing programs rather than General Fund purposes. This approach ensures continuing funding for important development projects, and could be expanded to include funding for infrastructure or other investments that can enhance housing development feasibility generally (including market-rate housing) and/or refined to direct the boomerang funds toward PDA projects.

## State Resources and Actions

The State of California through SB 375 created the statutory obligation for regional planning agencies to complete Sustainable Community Strategies in response to the state-wide goals set in AB 32 related to greenhouse gas emission reductions. This occurred at roughly the same time the state entered a fiscal crisis resulting from the Great Recession characterized by dramatic reductions in major state revenue sources without the corresponding ability to proportionately lower operating costs in the state budget. In response, the state has “realigned” revenues that would have otherwise flowed to local agencies (most notably those property taxes flowing to the state’s redevelopment agencies), further weakening the fiscal resources available to local governments to promote desirable development consistent with focused growth.

To achieve the transportation and land use patterns included in *Plan Bay Area* so that the region can achieve its greenhouse gas emission reductions, there are a range of state legislative changes, resource allocation changes, and interagency coordination efforts that will be required.

### **1. Creating new or expanded state funding programs to support SB 375 objectives**

To support the implementation of SB 375 and the various program suggestions provided above, the state could provide new funding for infrastructure required to achieve or promote implementation of the Sustainable Communities Strategies. The state is already pursuing this approach by directing a portion of “Cap-and-Trade” revenues toward infill development and affordable housing. As these funds must be shared throughout the state, however, the effectiveness of the Bay Area’s share in addressing the goals of *Plan Bay Area* may be diluted. Other potential funding sources could include, without limitation, the following:

- Bond Measures, similar to previous Proposition 1B and 1C for transportation and housing programs
- Property Transfer Taxes or Recording Fees
- Increases to the state tax on motor vehicle fuels

These various funding sources could be directed toward numerous investments that enhance the viability of development in PDAs and therefore the achievement of regional and state-mandated goals for *Plan Bay Area*. Examples may include street and transit improvements, utility upgrades, affordable housing costs, structured parking facilities (to enable intensive development), and similar investments that have already been promoted by previous statewide funding efforts. The resulting funding could be administered independently or through the currently under-funded State Infrastructure Bank and further directed as a part of the *PDA Investment and Growth Strategies* prepared by the CMAs. The State Infrastructure Bank program also could be adjusted to facilitate loans to more needy

projects, as the current practice has generally lent money only to very low-risk investments (and has had no defaults to date, accordingly).

## **2. Reinstating key Redevelopment powers and resources**

As noted above, loss of redevelopment authority has been a significant blow to local governments' ability to promote and participate in the type of development that is envisioned in *Plan Bay Area*. Key redevelopment powers needed include land assembly powers: the ability to purchase private land and sell this land to private developers for economic development and redevelopment purposes. Additional funding is also needed. While the existing EIFD legislation provides for the use of "tax increment financing" the proportionately low property tax apportionment factors of most cities, combined with their continuing need for funding citywide services make the use of EIFDs ineffective or undesirable in many locations. The state should create a program for incentivizing the use of EIFDs by matching locally allocated property tax increments with at least an equal share of state funding implemented through a proportional shift in local County ERAF (Educational Revenue Augmentation Fund) to the participating city, funded with Cap and Trade funding or other new state funding sources. Such matching funding would be a highly cost-effective means to providing greater financing capacity in PDAs. *Note: Near the completion of this report, AB 2 was signed into law, restoring some of the powers and financing capacity under previous Redevelopment law, including limited tax increment financing and the ability to acquire properties. However, the proportion of property taxes that can be used for such functions, plus tighter restrictions on project area eligibility, suggest that these restored tools may be less productive than those previously available.*

## **3. Updating and modernizing CEQA**

According to a recent study, roughly 80 percent of CEQA lawsuits filed between 2010 and 2012 have targeted infill development rather than sprawl projects.<sup>14</sup> Ongoing efforts to modernize and update CEQA should be linked to the state's statutory objectives reflected in AB-32 and SB-375 – specifically, reforms that reduce costs and risks of planned development in PDAs while maintaining a framework to mitigate environmental impacts of new development. While CEQA reform requires state legislative actions, MTC and ABAG should join other MPOs and stakeholders around the state in seeking these reforms specifically focusing on the following topics:

- Eliminate duplicative CEQA review in cases where a federal, state or local environmental or land use law has been enacted to achieve environmental protection objectives (e.g., air and water quality, greenhouse gas emission reductions, endangered species, wetlands protections, etc.).
- Eliminate duplicative CEQA review for projects that already comply with approved plans for which an Environmental Impact Report (EIR) has already been completed, such as a certified programmatic EIR on a Specific Plan for a PDA. State agencies, local governments and other lead agencies would continue to retain full authority to reject or

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<sup>14</sup> <http://www.hklaw.com/news/Holland-Knight-Study-Uncovers-Widespread-CEQA-Litigation-Abuse-08-04-2015/>

condition project approvals and impose additional mitigation measures consistent with their full authority under law other than CEQA.

- Refine and tighten the CEQA lawsuit process so that:
  - a. Challenges focus on failure to comply with CEQA's procedural and substantive requirements, rather than interpretations of the severity of projected impacts. Emphasis should be placed on adequate notice, adequate disclosure, adequate mitigation of environmental effects not regulated by other environmental or planning law, and adequate consideration of alternatives to avoid unmitigated significant adverse impacts.
  - b. Full disclosure laws apply to the identity of CEQA litigants. CEQA's public disclosure principles could be enhanced by requiring an annual report of project compliance with required mitigation measures made electronically available to the public as part of the existing Mitigation Monitoring and Reporting Plan process.

#### **4. Pursuing local government fiscal reform**

The structure of property taxes in California is a major obstacle to creating a balanced regional growth pattern, primarily because new housing is frequently perceived as generating more municipal service costs than municipal revenues. The current approach to taxation creates incentives to attract development that maximizes sales tax revenues, but creates a disconnect between the location of jobs, housing and transportation. In many communities, this discourages housing development and small business growth. Local governments are in need of a revenue base that is more equitable, stable, and effective. Fiscal reform efforts should support a long-term adjustment to commercial or residential tax rates to balance the financial incentives for new development.

## **Federal Resources and Actions**

The federal government traditionally plays important roles addressing key constraints to urban development. While politics and land use controls still occur at the local level, the federal government can help to address some of the issues affecting development feasibility and infrastructure needs. In particular, EPS believes the following federal actions will help to address some of the issues identified in this Readiness Assessment, and facilitate housing development in PDAs as envisioned in *Plan Bay Area*:

### **1. Increase funds for affordable housing**

Federal funding for key affordable housing programs such as HOME, low income housing tax credits, and Community Development Block Grants has diminished in recent years. This readiness assessment has indicated that, in many PDAs, even market-rate development faces feasibility challenges. By increasing federal funding for affordable housing production and retention, more new affordable projects can be completed, and some of the cost burden for this important community need can be shifted away from market-rate builders, making those projects more feasible as well.

### **2. Increase funds for transit systems**

Capital improvements for transit have heavily relied upon federal funding through programs such as "Small Starts" and "New Starts." While the PDAs all offer some level of transit

service, expansion of the services will be important to attracting substantially more housing. For example, the BART system is regarded as approaching its current maximum capacity for commute-hour service, so the housing price premiums often associated with proximity to BART stations may be diminished for future development if new residents cannot comfortably and conveniently use the system. Similarly, San Francisco has reported that its major infrastructure constraint is the need for expanded transit capacity, as other local infrastructure needs appear to be supportable given the high local housing values. While Federal Transit Administration funding has not diminished in recent years as significantly as federal funds for affordable housing programs, it will nevertheless be of benefit to achieving the broad environmental goals as well as development patterns of *Plan Bay Area* if more funding for transit is available.

### **3. Increase funds for other infrastructure and housing**

In addition to transit improvements and affordable housing, the federal government often contributes to the funding of infrastructure and other programs that support housing development directly or indirectly. The OBAG program and other programs administered by MTC are funded through federal transportation dollars. As discussed earlier, the effectiveness of these programs would be greatly enhanced if the funding levels were higher, as more and/or more costly improvements could be made. Similarly, more flexibility regarding the use of these funds could help to facilitate housing production, as the eligibility criteria can sometimes limit the funds' use to items that are not as critical to the success of new housing developments.

### **4. Support financing reforms that may facilitate condominium construction**

The Federal Housing Administration (FHA) created new rules following the Recession to reduce the financing risks associated with condominium projects. The new mortgage rules require, among other things, that 50 percent of all units be sold prior to endorsement for buyers to qualify for FHA-backed mortgages.<sup>15</sup> This means the first half of all units must be sold to buyers who do not seek the advantages of FHA-endorsed mortgages, without which the buyers typically have to pay significantly higher interest rates, thus reducing the price they can pay for the unit and diminishing the project's feasibility. For this reason and others (including the attractiveness of condo purchases for investors, given rising rents), an increasing proportion of condo sales have been all-cash transactions which only a small proportion of the population can afford, rather than traditionally financed. While EPS believes it is appropriate to mitigate some of the financing risks that contributed to the Recession, the chilling effect of these changes on condominium construction remains problematic. If current trends continue and new multifamily production is primarily or exclusively rental housing, this could result in community concerns regarding the perceived differences between renters and owners and/or limited opportunities for home ownership and wealth creation for new residents.

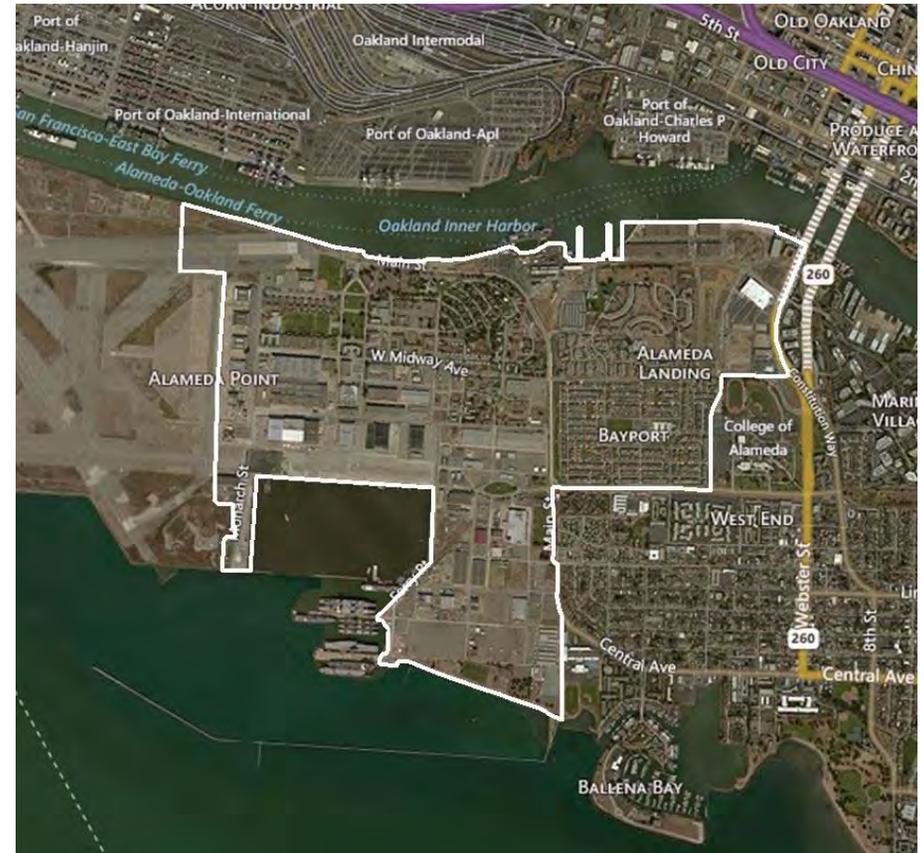
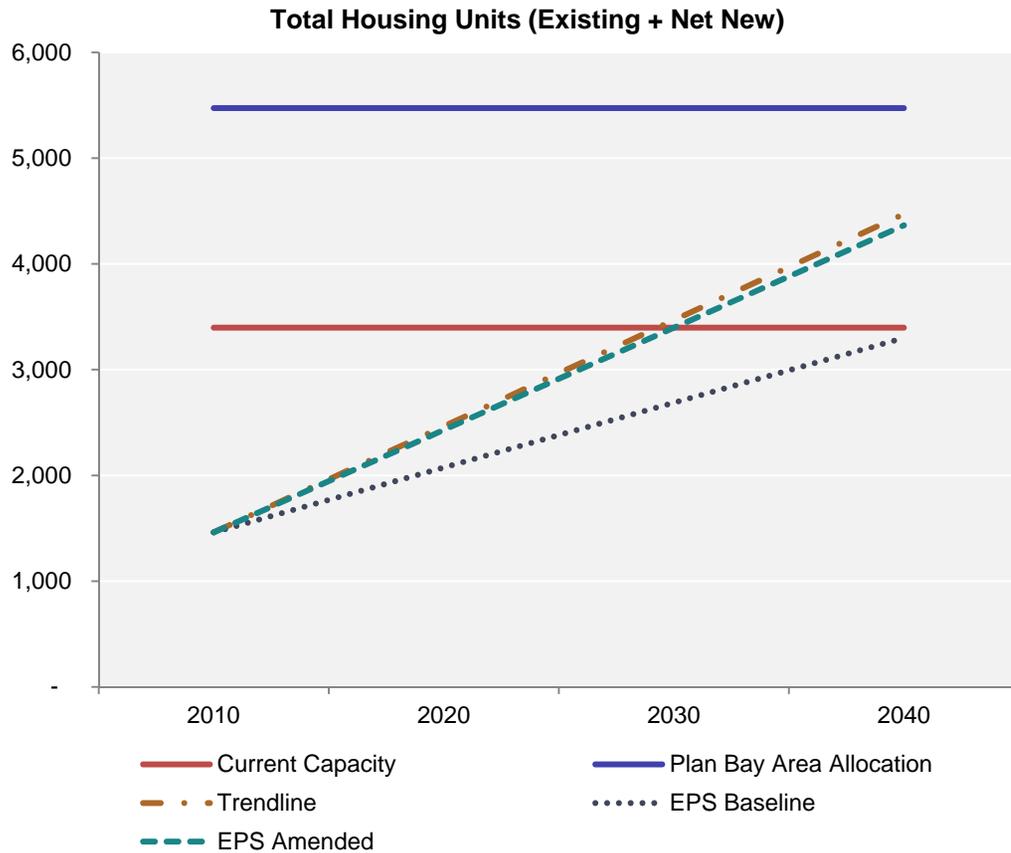
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<sup>15</sup> <http://fhareview.com/the-guidelines-fhaapprovalguidelines/>



**APPENDIX A:**  
**PDA Readiness Criteria Worksheets**

# Alameda: Naval Air Station



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
4,010	1,935	1,838	46%	Community-driven density limits due to congestion concerns	2,903	72%	Increased zoning capacity and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,935				1225 net new DUs at AP Reuse Plan (with 25% affordable in addition to 200 Collaborative existing units), Alameda Landing has 275 DUs planned, "North Housing" has 435 DUs planned (some aff hsg).
		2	<i>Plan Bay Area</i> new housing allocation				4,010	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,075)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Alameda Point EIR alternatives included a detailed scenario up to 3,500 units, but City has not amended the current plans. Increase in density would require additional payments to the Navy for acquisition of the land.
		5	Estimated gross housing capacity at each period		1,935	1,935	1,935	
		6	Sum of Capacity Constraint Coefficients		0.55	0.25	0.05	Expect most of currently planned growth will be complete by 2030, but that a next phase of development more dense than currently allowed will lag in the later years.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.10	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.30	0.15	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.05	
		7	EPS estimate of housing production given constraints		871	1,451	1,838	Early years assume buildout of Alameda Landing and North Housing sites, plus part of the first phase of residential development at Alameda Point
		8	Percentage of PDA 2040 housing allocation accommodated		21.7%	36.2%	45.8%	
		<b>Summary</b>		The Naval Air Station PDA includes Alameda Point, one of the interior Bay Area's largest infill sites, plus other sites nearby. All have undergone substantial planning, and projects are proposed or under construction on all the major sites. Though infrastructure needs are considerable for the Alameda Point site, developers are competing for the rights to build there, including obligations to fund major infrastructure upgrades. The currently allowed density is modest due to Alameda's traffic congestion concerns and full buildout of currently planned capacity may be slowed by needs for major transportation improvements beyond the project's ability to support.				

**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Alameda Point zoning, General Plan amendment, Town Center Specific Plan and EIR adopted 2014.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	<b>0.05</b>	0.00	0.00	Council has supported designation of this PDA and has shown commitment to supporting economic development in this area, and has adopted the rezoning, EIR, and supporting documents. Some current Council members were elected in part on slower-growth platforms that may affect this PDA.	
		2	History of neighborhood opposition	<b>0.05</b>	0.00	0.00	Community support has grown, though some remain concerned about traffic impacts; a ballot measure by former master developer (SunCal) to greatly increase densities was soundly defeated in 2010.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.30</b>	<b>0.15</b>	0.00	Bayport developed 586 units between 2000-2010; Alameda Landing units are under construction now. At 586 units/decade, all existing sites would be built out as planned by 2040.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Alameda Point Site A (800 housing units) received Council approval this summer; 285 units under construction at Alameda Landing; another ~800 units are in the pipeline elsewhere in the City. All expected to be built between 2015-2023.	
		3	General Market Conditions	0.00	0.00	0.00	High incomes, education levels, and home prices in Alameda; unique Bay Bridge/SF views from this PDA; developers express little concern about market demand for these units.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	No major concerns regarding vertical development values, but infrastructure costs are the major feasibility constraint (addressed below)	

**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Adequate for large-scale projects
		6	Existence of major investment disincentives		0.00	0.00	0.00	Access limitations (congestion in the Webster Tube) are the primary constraint, but congestion could be improved or maintained at current levels with conceived transit projects (ferry, BART connector); schools are fine and have some capacity (other than elementary); former Superfund site but land cleanup is proceeding.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		<b>0.10</b>	<b>0.05</b>	0.00	Needs include on-site roadways and utilities, transit improvements, parks, and congestion mitigation. \$600M of infrastructure required to support planned development at Alameda Point, of which \$103M will be funded through first phase of development currently seeking approval. Remainder subject to a burden of \$1M/acre impact fee payments on residential development, potentially in lieu of land purchase price.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Master Infrastructure Plan adopted and impact fee of roughly \$1M/acre required for all residential and commercial development. CFD also anticipated to finance a portion of the impact fee obligations.
		3	PDA financing capacity		<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Impact fee on residential/mixed-use appears to be supportable in current market, as evident by developer seeking approval for project agreement including fee payments or in-kind provision. TBD if commercial development can support its infrastructure fee, and if not, future housing phases (if upzoning occurs) may need to fund greater proportion.

**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,935				1225 net new DUs at AP Reuse Plan (with 25% affordable in addition to 200 Collaborative existing units), Alameda Landing has 275 DUs planned, "North Housing" has 435 DUs planned (some aff hsg).
		2	<i>Plan Bay Area</i> new housing allocation				4,010	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,075)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	25%	50%	Alameda Point EIR alternatives included a detailed scenario up to 3,500 units, but City has not amended the current plans. Increase in density would require additional payments to the Navy for acquisition of the land.  <i>Amended assumes City would plan for significant density increase at some point prior to 2040, responding to market signals and capitalizing on initial infrastructure investments.</i>
		5	Estimated gross housing capacity at each period	1,935	2,419	2,903		
		6	Sum of Capacity Constraint Coefficients	0.55	0.25	0.00		Expect most of currently planned growth will be complete by 2030, but that a next phase of development more dense than currently allowed will lag in the later years.
			<i>Planning and Entitlement Criteria</i>	0.00	0.00	0.00		
			<i>Community Support</i>	0.10	0.00	0.00		
			<i>Market and Investment Attractiveness</i>	0.30	0.15	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>	0.15	0.10	0.00		
		7	EPS estimate of housing production given constraints	871	1,814	2,903		Early years assume buildout of Alameda Landing and North Housing sites, plus part of the first phase of residential development at Alameda Point
		8	Percentage of PDA 2040 housing allocation accommodated	21.7%	45.2%	72.4%		
		<b>Summary</b>		<p>The Naval Air Station PDA includes Alameda Point, one of the interior Bay Area's largest infill sites, plus other sites nearby. All have undergone substantial planning, and projects are proposed or under construction on all the major sites. Though infrastructure needs are considerable for the Alameda Point site, developers are competing for the rights to build there, including obligations to fund major infrastructure upgrades. The currently allowed density is modest due to Alameda's traffic congestion concerns and full buildout of currently planned capacity may be slowed by needs for major transportation improvements beyond the project's ability to support.</p> <p><i>Amended scenario assumes external funding for these improvements, and additional capacity may be created thereafter through upzoning to levels already contemplated in the City's EIR, but not full EIR scenario as some development will already have occurred.</i></p>				

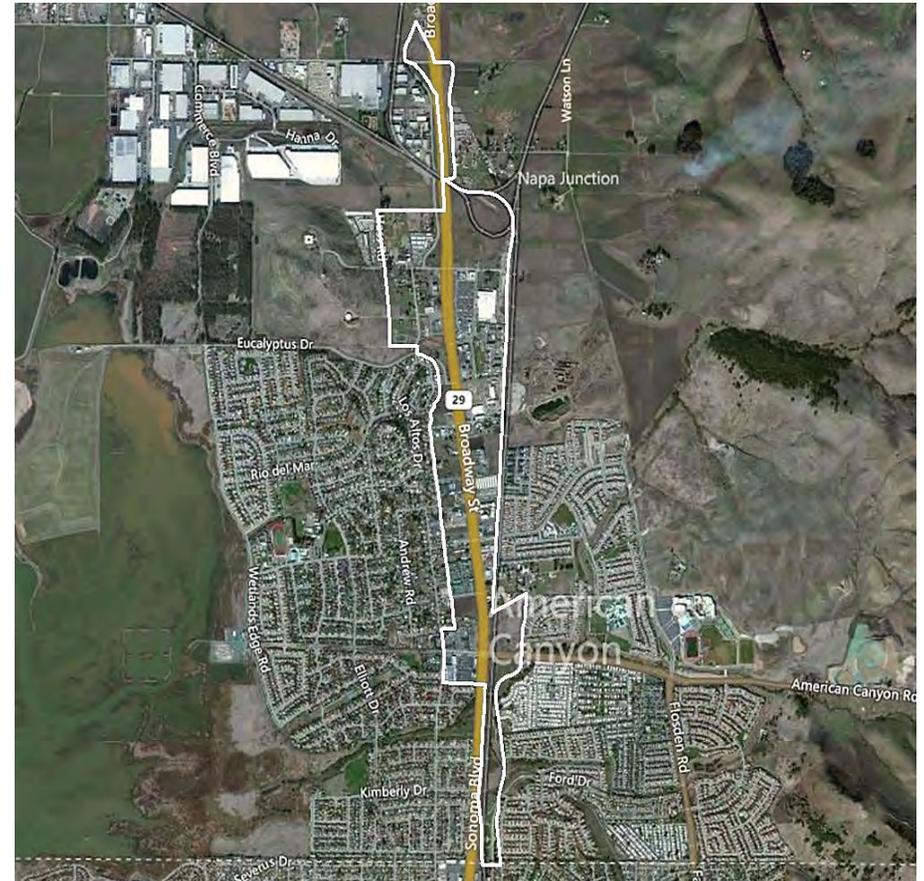
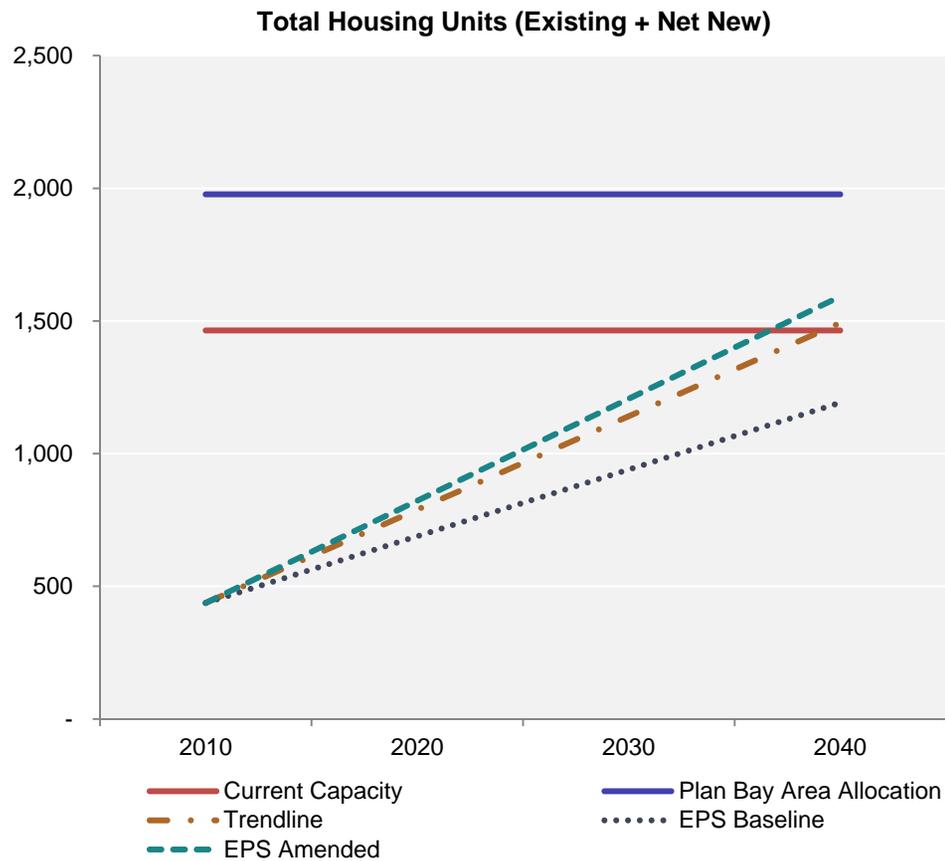
**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Alameda Point zoning, General Plan amendment, Town Center Specific Plan and EIR adopted 2014.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		<b>0.05</b>	0.00	0.00	Council has supported designation of this PDA and has shown commitment to supporting economic development in this area, and has adopted the rezoning, EIR, and supporting documents. Some current Council members were elected in part on slower-growth platforms that may affect this PDA.
		2	History of neighborhood opposition		<b>0.05</b>	0.00	0.00	Community support has grown, though some remain concerned about traffic impacts; a ballot measure by former master developer (SunCal) to greatly increase densities was soundly defeated in 2010.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.30</b>	<b>0.15</b>	0.00	Bayport developed 586 units between 2000-2010; Alameda Landing units are under construction now. At 586 units/decade, all existing sites would be built out as planned by 2040.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Alameda Point Site A (800 housing units) received Council approval this summer; 285 units under construction at Alameda Landing; another ~800 units are in the pipeline elsewhere in the City. All expected to be built between 2015-2023.
		3	General Market Conditions		0.00	0.00	0.00	High incomes, education levels, and home prices in Alameda; unique Bay Bridge/SF views from this PDA; developers express little concern about market demand for these units
		4	Financial Feasibility Constraint		0.00	0.00	0.00	No major concerns regarding vertical development values, but infrastructure costs are the major feasibility constraint (addressed below)
		5	Parcel size and configuration		0.00	0.00	0.00	Adequate for large-scale projects
		6	Existence of major investment disincentives		0.00	0.00	0.00	Access limitations (congestion in the Webster Tube) are the primary constraint, but congestion could be improved or maintained at current levels with conceived transit projects (ferry, BART connector); schools are fine and have some capacity (other than elementary); former Superfund site but land cleanup is proceeding.

**Table A-1. Alameda: Naval Air Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.10	0.05	0.00	Needs include on-site roadways and utilities, transit improvements, parks, and congestion mitigation. \$600M of infrastructure required to support planned development at Alameda Point, of which \$103M will be funded through first phase of development currently seeking approval. Remainder subject to a burden of \$1M/acre impact fee payments on residential development, potentially in lieu of land purchase price.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Master Infrastructure Plan adopted and impact fee of roughly \$1M/acre required for all residential and commercial development. CFD also anticipated to finance a portion of the impact fee obligations.
		3	PDA financing capacity		0.05	0.05	0.00	Impact fee on residential/mixed-use appears to be supportable in current market, as evident by developer seeking approval for project agreement including fee payments or in-kind provision. TBD if commercial development can support its infrastructure fee, and if not, future housing phases (if upzoning occurs) may need to fund greater proportion.
Amended assumes additional infrastructure funded through external sources.								

# American Canyon: Highway 29 Corridor



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,540	1,027	755	49%	Modest pricing and infrastructure needs	1,156	75%	Increased capacity and infrastructure resources

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-2. American Canyon: Highway 29 Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,027				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,540	This number refers to the increment of new housing allocated to the PDA in <i>Plan Bay Area</i> .
		3	Capacity surplus or (shortfall)	(513)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	5%	
		5	Estimated gross housing capacity at each period		1,027	1,027	1,078	
		6	Sum of Capacity Constraint Coefficients		0.65	0.40	0.30	
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.40	0.25	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.15	0.15	
		7	EPS estimate of housing production given constraints		359	616	755	
		8	Percentage of PDA 2040 housing allocation accommodated		23.3%	40.0%	49.0%	
			Summary	American Canyon is currently working on development and adoption of a Specific Plan called "Broadway District Specific Plan " and program EIR for the corridor. American Canyon has mostly seen single-family, subdivision style development. The corridor though, has a number of multifamily projects in the pipeline, including market-rate and affordable projects summing to about 380 units along Highway 29. The major barriers to achievement of the 1,540 unit allocation by 2040 are: mobility needs on Highway 29 (e.g., widening from 4- to 6-lanes and addition of bike lanes); water availability (City requires new development to have a net zero impact on potable water use Citywide); competition from projects such as Watson Ranch (single-family residential) and commercial land uses along the corridor; and sustained market support for multifamily housing (the City would need to produce nearly as many units in the PDA, per year, as had been produced Citywide for the last 20 years to achieve the 2040 allocation).				

**Table A-2. American Canyon: Highway 29 Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	No, the City is currently working on a Specific Plan for the PDA, anticipated to be completed in 2017. A programmatic EIR is being completed concurrent to the Specific Plan. Current zoning in the PDA is "commercial corridor" and allows multifamily residential.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No, residential displacement is not anticipated as development along the corridor fills in vacant lots, intensifies existing uses, or redevelops parcels.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of recent multifamily development in the City during the last three years.	
		2	History of neighborhood opposition	0.00	0.00	0.00	While neighbors of particular projects have participated in development review and planning processes to advocate their views, there are no known organized groups opposed to development or the higher density development envisioned in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	<p>Investment in new housing in Napa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 20% of the peak-level reached in 2003. This is similar to the County as a whole (which produced about 20% of the peak-number of permits since 2000 in 2013) but lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 80 units permitted per year between 1980 and 2013. The PDA would need to average 40 units per year between 2010 and 2040 to achieve its unit-allocation.</p> <p>Multifamily housing starts in American Canyon have comprised 12% of total housing starts since 1980 which is smaller proportion than Napa County (which was 23%).</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole.</p>	
		2	Recent Local Development Activity (pipeline)	0.05	0.00	0.00	The City's recent projects include a 700-unit single-family community called Vintage Ranch (built roughly between 2005 and 2015). The development pipeline in the PDA includes about 380 multifamily units including a 148-unit apartment project, a 164-unit townhome-style development, and a 70-unit affordable, senior apartment project. These projects account for more than 20 percent of the total 2040-unit allocation in the PDA.	

**Table A-2. American Canyon: Highway 29 Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and lower price-growth than Bay Area-wide sales. Household income of existing PDA residents are higher than the median for the Bay Area (\$95,500 compared with \$80,300). Population growth since 2000 in the PDA exceeded population growth Bay Area-wide (80% growth in the PDA compared with 7% growth Bay Area-wide) though multifamily housing unit production in the Bay Area exceeded 25% during the period while in American Canyon, the same growth indicator was only 6%.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.90 per sq.ft. per month for apartments and \$210 per square foot for condos. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.	
		5	Parcel size and configuration	0.00	0.00	0.00	Available parcels along the corridor are large enough for new development.	
		6	Existence of major investment disincentives	0.05	0.05	0.05	The City is responsible for potable water supply and has a "net zero" effect policy for new development's impact on existing ratepayers and the City's total use of potable water. This policy has been implemented by requiring new projects to fund improvements (typically conservation projects) which reduce the existing demand for water, commensurate with the demand for water expected by the growth. The City is planning to implement a fee which would provide more cost-certainty for new development.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.10	The City's two major infrastructure needs for new development are water capacity and roadway capacity. Highway 29 is a congested State route with no nearby, parallel routes. The City has long-term plans to widen the four-lane road to six lanes for vehicle traffic and a Class I bicycle path. Currently, projects seeking approval along the route require trigger significant traffic impacts.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	For traffic improvements City has development impact fees which contribute to the expansion of Highway 29 and other capacity improvements (about 40% of total costs) with the remaining funding sources to be determined, likely to include external funding. The City is also focusing on improving the water availability issue.	
		3	PDA financing capacity	0.05	0.05	0.05	The financing capacity will be determined as part of the Specific Plan process, but the need for major changes to Highway 29 for auto and multimodal improvements are likely to create financing capacity issues for new development and for existing deficiencies.	

**Table A-2. American Canyon: Highway 29 Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,027				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,540	This number refers to the increment of new housing allocated to the PDA in <i>Plan Bay Area</i> .
		3	Capacity surplus or (shortfall)	(513)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		50%	50%	50%	Assume Specific Plan process results in increased capacity.
		5	Estimated gross housing capacity at each period		1,541	1,541	1,541	
		6	Sum of Capacity Constraint Coefficients		0.60	0.35	0.25	
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.40	0.25	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.10	0.10	
		7	EPS estimate of housing production given constraints		616	1,001	1,156	
		8	Percentage of PDA 2040 housing allocation accommodated		40.0%	65.0%	75.0%	
			Summary	<p>American Canyon is currently working on development and adoption of a Specific Plan called "Broadway District Specific Plan " and program EIR for the corridor. American Canyon has mostly seen single-family, subdivision style development. The corridor though, has a number of multifamily projects in the pipeline, including market-rate and affordable projects summing to about 380 units along Highway 29. The major barriers to achievement of the 1,540 unit allocation by 2040 are: mobility needs on Highway 29 (e.g., widening from 4- to 6-lanes and addition of bike lanes); water availability (City requires new development to have a net zero impact on potable water use Citywide); competition from projects such as Watson Ranch (single-family residential) and commercial land uses along the corridor; and sustained market support for multifamily housing (the City would need to produce nearly as many units in the PDA, per year, as had been produced Citywide for the last 20 years to achieve the 2040 allocation).</p> <p>As an amendment, assume that the Specific Plan is completed for the PDA and additional sources are available to assist with Highway 29 widening work.</p>				

**Table A-2. American Canyon: Highway 29 Corridor**

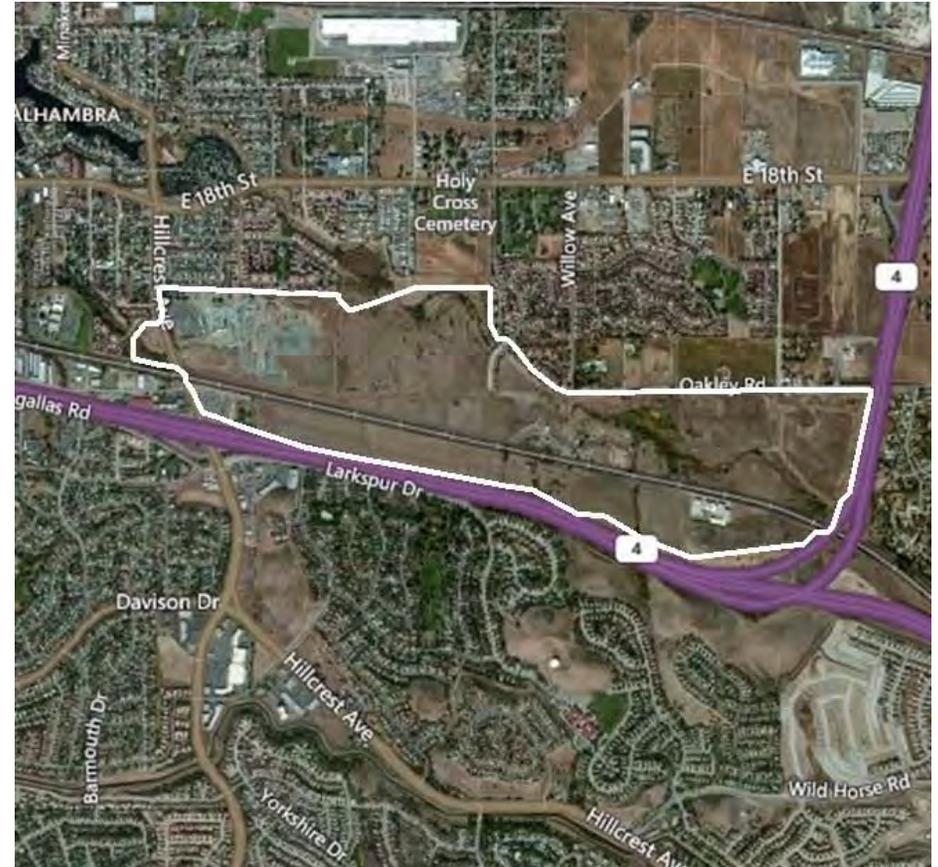
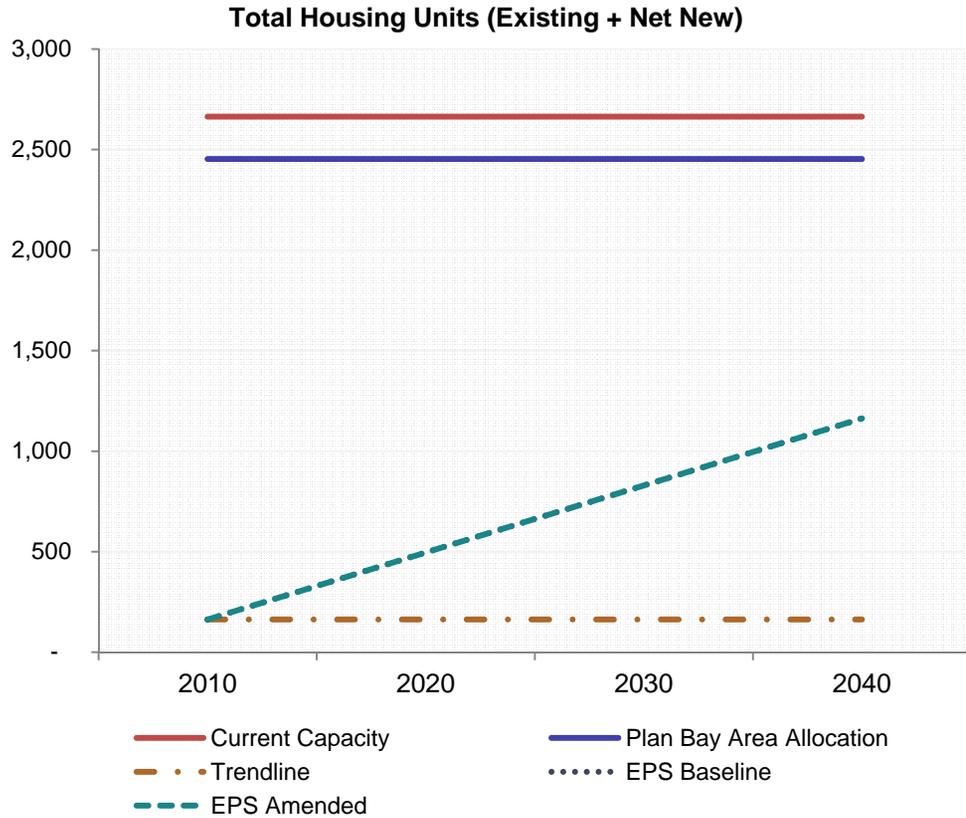
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	No, the City is currently working on a Specific Plan for the PDA, anticipated to be completed in 2017. A programmatic EIR is being completed concurrent to the Specific Plan. Current zoning in the PDA is "commercial corridor" and allows multifamily residential.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No, residential displacement is not anticipated as development along the corridor fills in vacant lots, intensifies existing uses, or redevelops parcels.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of recent multifamily development in the City during the last three years.	
		2	History of neighborhood opposition	0.00	0.00	0.00	While neighbors of particular projects have participated in development review and planning processes to advocate their views, there are no known organized groups opposed to development or the higher density development envisioned in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	<p>Investment in new housing in Napa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 20% of the peak-level reached in 2003. This is similar to the County as a whole (which produced about 20% of the peak-number of permits since 2000 in 2013) but lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 175 units permitted per year between 1990 and 2013. The PDA would need to average 70 units per year between 2015 and 2040 to achieve its unit-allocation.</p> <p>Multifamily housing starts in American Canyon have comprised 12% of total housing starts since 1980 which is smaller proportion than Napa County (which was 23%).</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1990 and 2013 to reach the allocation.</p>	

**Table A-2. American Canyon: Highway 29 Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b>	2	Recent Local Development Activity (pipeline)	0.05	0.00	0.00	The City's recent projects include a 700-unit single-family community called Vintage Ranch (built roughly between 2005 and 2015). The development pipeline in the PDA includes about 380 multifamily units including a 148-unit apartment project, a 164-unit townhome-style development, and a 70-unit affordable, senior apartment project. These projects account for more than 20 percent of the total 2040-unit allocation in the PDA.	
		3	General Market Conditions	0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and lower price-growth than Bay Area-wide sales. Household income of existing PDA residents are higher than the median for the Bay Area (\$95,500 compared with \$80,300). Population growth since 2000 in the PDA exceeded population growth Bay Area-wide (80% growth in the PDA compared with 7% growth Bay Area-wide) though multifamily housing unit production in the Bay Area exceeded 25% during the period while in American Canyon, the same growth indicator was only 6%.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.90 per sq.ft. per month for apartments and \$210 per square foot for condos. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.	
		5	Parcel size and configuration	0.00	0.00	0.00	Available parcels along the corridor are large enough for new development.	
		6	Existence of major investment disincentives	0.05	0.05	0.05	The City is responsible for potable water supply and has a "net zero" effect policy for new development's impact on existing ratepayers and the City's total use of potable water. This policy has been implemented by requiring new projects to fund improvements (typically conservation projects) which reduce the existing demand for water, commensurate with the demand for water expected by the growth. The City is planning to implement a fee which would provide more cost-certainty for new development.	
		<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.10
2	Is there an existing CIP funded or other infrastructure financing plan in place?			0.00	0.00	0.00	For traffic improvements City has development impact fees which contribute to the expansion of Highway 29 and other capacity improvements (about 40% of total costs) with the remaining funding sources to be determined, likely to include external funding. The City is also focusing on improving the water availability issue.	
3	PDA financing capacity			0.00	0.00	0.00	The financing capacity will be determined as part of the Specific Plan process, but the need for major changes to Highway 29 for auto and multimodal improvements are likely to create financing capacity issues for new development and for existing deficiencies.	

Assumes additional funding sources to fully fund Highway 29 improvements.

# Antioch: Hillcrest eBART Station



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,290	2,500	1,000	44%	Infrastructure needs, modest pricing, and limited market for multifamily product	1,375	60%	External infrastructure funding or EIFD

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,500				Hillcrest Station Area Specific Plan (adopted 2009) has planned capacity for 2,500 housing units and 5,600 jobs, including 1.2M SF office and 1.0M SF retail.
		2	<i>Plan Bay Area</i> new housing allocation				2,290	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	210				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	PDA is already planned to support <i>Plan Bay Area</i> density, and no known market or political pressure to increase this density
		5	Estimated gross housing capacity at each period		2,500	2,500	2,500	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.60	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.40	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.30	0.30	
		7	EPS estimate of housing production given constraints		125	750	1,000	
		8	Percentage of PDA 2040 housing allocation accommodated		5.5%	32.8%	43.7%	
		Summary		This PDA is adding an eBART station which may enhance market viability, but infrastructure needs are substantial and plan's inclusion of higher-density products represent a market and feasibility constraint. EPS baseline buildout assumes products are built at lower average density than allowed in Specific Plan.				

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	PDA-supportive Specific Plan and EIR is already in place and adopted (2009).
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Hillcrest Station Area Specific Plan (adopted 2009) has planned capacity for higher-density development of 2,500 housing units and 5,600 jobs, which is adequate to accommodate PDA growth projections through 2040. City has a Growth Management Plan, but the Hillcrest area is exempt.
		2	History of neighborhood opposition		0.00	0.00	0.00	City reports that stakeholders ranging from unions to neighborhood groups to regional planning advocates have been supportive of the Specific Plan. Community wants density in this PDA rather than other greenfield areas.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.25</b>	<b>0.15</b>	<b>0.05</b>	PDA remains mostly undeveloped, but City has had significant residential growth in recent decades, growing by 52 percent from 1990 to 2010 (Department of Finance). Very little of the growth in recent decades has been in higher-density product types, with only 858 multifamily units built in the city from 1990-2010, <8% of all new units (RAND). Employment growth has not kept pace, and Antioch has a significant jobs/housing imbalance with well below 1 job per household, and a lower proportion in 2010 than in 1990.
		2	Recent Local Development Activity (pipeline)		<b>0.10</b>	0.00	0.00	City reports no units are currently in the pipeline in this PDA.
		3	General Market Conditions		<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Antioch's median household incomes have been stagnant, and large households (5+ people) have grown much faster than average, reflecting the City's appeal to suburban family market rather than households seeking higher density housing types (the market anticipated in the Specific Plan). Antioch home prices decreased significantly after 2006 peak, and have not fully recovered. The introduction of eBART around 2017 will make the PDA more attractive and regionally accessible.

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		4	Financial Feasibility Constraint		<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Land cost basis is low due to undeveloped status. Still, higher-density product types as planned for PDA and Specific Plan face significant feasibility challenges and yield negative residual land value under current market conditions. Inadequate existing infrastructure compounds this problem, by requiring significant upfront investment subject to eventual reimbursement.
		5	Parcel size and configuration		0.00	0.00	0.00	PDA is mostly undeveloped and has been planned for subdivision into sites of adequate size and configuration to enable development.
		6	Existence of major investment disincentives		<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	A currently fairly inactive freight rail line on the edge of the development area, crime rate is worse than surrounding area (exacerbated by reduction in forces), and schools are considered to be underperforming vs. adjacent communities.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	PDA is virtually undeveloped, and requires an estimated \$116 million of infrastructure investment to accommodate planned growth, virtually all of which is for vehicular circulation (\$108 million). Even a modest first phase of development requires \$35 million of infrastructure costs.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		<b>0.05</b>	0.00	0.00	The Hillcrest Station Area Specific Plan included an infrastructure financing plan (dated 2010), but it identified major challenges to feasibility and indicated that the area development is not likely to be feasible unless Redevelopment contributes \$25 million in tax increment financing. This is not currently possible. Also, the financing plan identified a need for a very aggressive total tax burden under a Community Facilities District, which has not yet been established and is not currently being prepared.
		3	PDA financing capacity		<b>0.20</b>	<b>0.20</b>	<b>0.20</b>	The Hillcrest Station Area Specific Plan assumed developments would yield \$62 million in impact fees plus an additional \$81 million of infrastructure investment that would be funded by developers through CFDs and/or equity. These sums create a major feasibility hurdle for the overall project, summing to nearly \$60,000 of obligation per housing unit, while home prices in Antioch have been very modest since 2008. The financial hardship for the Hillcrest Specific Plan is particularly great in early years due to mismatch of phased costs vs. value creation. A scenario that included Redevelopment funding \$25 million through tax increment financing was significantly more feasible, but is not currently an option.

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,500				Hillcrest Station Area Specific Plan (adopted 2009) has planned capacity for 2,500 housing units and 5,600 jobs, including 1.2M SF office and 1.0M SF retail.
		2	<i>Plan Bay Area</i> new housing allocation				2,290	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	210				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	PDA is already planned to support <i>Plan Bay Area</i> density, and no known market or political pressure to increase this density
		5	Estimated gross housing capacity at each period		2,500	2,500	2,500	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.40	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.30	0.15	
		7	EPS estimate of housing production given constraints		125	750	1,375	Consistent with long-term market absorption of multifamily units in Antioch (~850 from 1990-2010).
		8	Percentage of PDA 2040 housing allocation accommodated		5.5%	32.8%	60.0%	
			Summary	This PDA is adding an eBART station which may enhance market viability, but infrastructure needs are substantial and plan's inclusion of higher-density products represent a market and feasibility constraint. EPS baseline buildout assumes products are built at lower average density than allowed in Specific Plan.				
				Amended scenario assumes EIFD or external funding for infrastructure can marginally improve yield.				

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	PDA-supportive Specific Plan and EIR is already in place and adopted (2009).	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Hillcrest Station Area Specific Plan (adopted 2009) has planned capacity for higher-density development of 2,500 housing units and 5,600 jobs, which is adequate to accommodate PDA growth projections through 2040. City has a Growth Management Plan, but the Hillcrest area is exempt.	
		2	History of neighborhood opposition	0.00	0.00	0.00	City reports that stakeholders ranging from unions to neighborhood groups to regional planning advocates have been supportive of the Specific Plan. Community wants density in this PDA rather than other greenfield areas.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.25</b>	<b>0.15</b>	<b>0.05</b>	PDA remains mostly undeveloped, but City has had significant residential growth in recent decades, growing by 52 percent from 1990 to 2010 (Department of Finance). Very little of the growth in recent decades has been in higher-density product types, with only 858 multifamily units built in the city from 1990-2010, <8% of all new units (RAND). Employment growth has not kept pace, and Antioch has a significant jobs/housing imbalance with well below 1 job per household, and a lower proportion in 2010 than in 1990.	
		2	Recent Local Development Activity (pipeline)	<b>0.10</b>	0.00	0.00	City reports no units are currently in the pipeline in this PDA.	
		3	General Market Conditions	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Antioch's median household incomes have been stagnant, and large households (5+ people) have grown much faster than average, reflecting the City's appeal to suburban family market rather than households seeking higher density housing types (the market anticipated in the Specific Plan). Antioch home prices decreased significantly after 2006 peak, and have not fully recovered. The introduction of eBART around 2017 will make the PDA more attractive and regionally accessible.	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Land cost basis is low due to undeveloped status. Still, higher-density product types as planned for PDA and Specific Plan face significant feasibility challenges and yield negative residual land value under current market conditions. Inadequate existing infrastructure compounds this problem, by requiring significant upfront investment subject to eventual reimbursement.	
		5	Parcel size and configuration	0.00	0.00	0.00	PDA is mostly undeveloped and has been planned for subdivision into sites of adequate size and configuration to enable development.	
		6	Existence of major investment disincentives	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	A currently fairly inactive freight rail line on the edge of the development area, crime rate is worse than surrounding area (exacerbated by reduction in forces), and schools are considered to be underperforming vs. adjacent communities.	

**Table A-3. Antioch: Hillcrest eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity	0.10	0.10	0.05	<p>PDA is virtually undeveloped, and requires an estimated \$116 million of infrastructure investment to accommodate planned growth, virtually all of which is for vehicular circulation (\$108 million). Even a modest first phase of development requires \$35 million of infrastructure costs.</p> <p><i>Amended scenario assumes creation of EIFD or external funding to enhance but not fully solve infrastructure financing capacity constraint.</i></p>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.00	0.00	<p>The Hillcrest Station Area Specific Plan included an infrastructure financing plan (dated 2010), but it identified major challenges to feasibility and indicated that the area development is not likely to be feasible unless Redevelopment contributes \$25 million in tax increment financing. This is not currently possible. Also, the financing plan identified a need for a very aggressive total tax burden under a Community Facilities District, which has not yet been established and is not currently being prepared.</p>	
		3	PDA financing capacity	0.20	0.20	0.10	<p>The Hillcrest Station Area Specific Plan assumed developments would yield \$62 million in impact fees plus an additional \$81 million of infrastructure investment that would be funded by developers through CFDs and/or equity. These sums create a major feasibility hurdle for the overall project, summing to nearly \$60,000 of obligation per housing unit, while home prices in Antioch have been very modest since 2008. The financial hardship for the Hillcrest Specific Plan is particularly great in early years due to mismatch of phased costs vs. value creation. A scenario that included Redevelopment funding \$25 million through tax increment financing was significantly more feasible, but is not currently an option.</p> <p><i>Amended scenario assumes creation of EIFD or external funding to enhance but not fully solve infrastructure financing capacity constraint.</i></p>	



**Table A-4. Antioch: Rivertown Waterfront**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,204				Specific Plan scenarios presented to City Council in June 2015 included "higher density" option at up to 37 units/acre, yielding an aggregate 2204 potential units. Lower density option had as few as 856 units, in detached and attached home products.
		2	<i>Plan Bay Area</i> new housing allocation				1,830	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	374				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,204	2,204	2,204	
		6	Sum of Capacity Constraint Coefficients		0.95	0.75	0.60	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.05	0.05	
			<i>Market and Investment Attractiveness</i>		0.85	0.65	0.50	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.05	
		7	EPS estimate of housing production given constraints		110	551	882	
		8	Percentage of PDA 2040 housing allocation accommodated		6.0%	30.1%	48.2%	
			<b>Summary</b>	Development faces major market constraints in this location. The purpose of the Specific Plan is to revitalize this area, but the lack of vitality will constrain housing investment in the near term. Also, the limited history of successful multifamily housing in Antioch suggests that feasible product types will be lower density detached and attached homes.				

**Table A-4. Antioch: Rivertown Waterfront**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Master Development Plan Initial Study completed in 2006, and a Specific Plan is currently underway with completion expected in 2016. City seeks to preserve flexibility for development in the upcoming EIR for this area.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Ample opportunity sites exist without displacement of existing residential.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City Council has been supportive of higher density development concepts and infill, but hasn't materialized due to market constraints.	
		2	History of neighborhood opposition	0.05	0.05	0.05	Rivertown Preservation Society seeks more downtown shopping and amenities, may push for lower density housing scenario.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.35	0.20	City has little recent history of infill development, as most recent product has been detached homes in large subdivisions. Unlike at Hillcrest PDA, development in this PDA would be subject to the City's growth management plan limiting housing development to 600 units/year without discretionary action.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	City reports no units in the current pipeline.	
		3	General Market Conditions	0.10	0.10	0.10	Antioch's median household incomes have been stagnant, and large households (5+ people) have grown much faster than average, reflecting the City's appeal to suburban family market rather than households seeking higher density housing types (the market anticipated in the Specific Plan). Antioch home prices decreased significantly after 2006 peak, and have not fully recovered. City issued an RFP for a 4-acre parcel for housing or hotel, and received no responses.	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Achievable prices for higher density products are unlikely to support new construction. Lower density products should be feasible, but market depth at this location may be an issue.	

**Table A-4. Antioch: Rivertown Waterfront**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration		0.05	0.05	0.05	Parcels are generally of reasonable scale for development, but infill location does create some parcelization/assembly issues.
		6	Existence of major investment disincentives		0.05	0.05	0.05	Crime rate is worse than surrounding area (exacerbated by reduction in forces), and schools are considered to be underperforming vs. adjacent communities. The general fiscal weakness of the City is also considered a deterrent to investment.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.00	0.00	0.00	No major investments are believed to be required in this PDA.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has impact fees that would apply to this PDA.
		3	PDA financing capacity		0.05	0.05	0.05	General feasibility challenge suggests that even a modest impact fee burden may discourage growth in this PDA.

**Table A-4. Antioch: Rivertown Waterfront**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,204				Specific Plan scenarios presented to City Council in June 2015 included "higher density" option at up to 37 units/acre, yielding an aggregate 2204 potential units. Lower density option had as few as 856 units, in detached and attached home products.
		2	<i>Plan Bay Area</i> new housing allocation				1,830	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	374				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,204	2,204	2,204	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.85	0.65	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.00	
		7	EPS estimate of housing production given constraints		110	661	1,212	
		8	Percentage of PDA 2040 housing allocation accommodated		6.0%	36.1%	66.2%	
		Summary		Development faces major market constraints in this location. The purpose of the Specific Plan is to revitalize this area, but the lack of vitality will constrain housing investment in the near term. Also, the limited history of successful multifamily housing in Antioch suggests that feasible product types will be lower density detached and attached homes.  <b>Amended scenario assumes parcel assembly tools and external infrastructure funding can modestly enhance housing development yield.</b>				

**Table A-4. Antioch: Rivertown Waterfront**

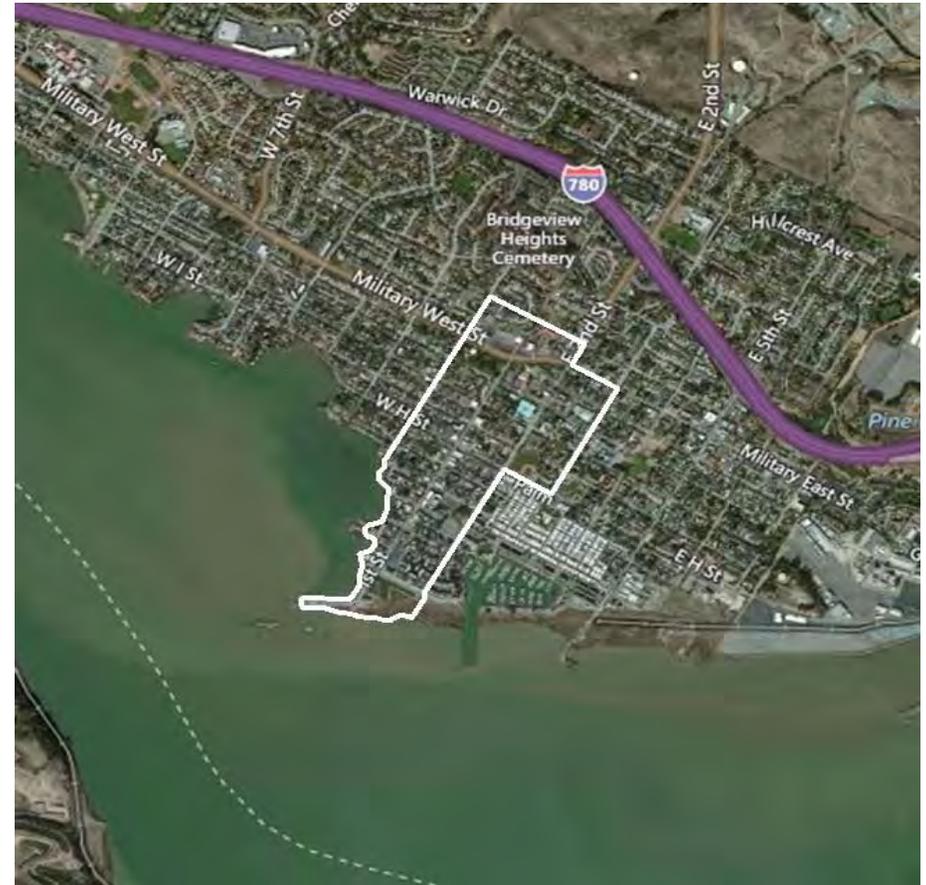
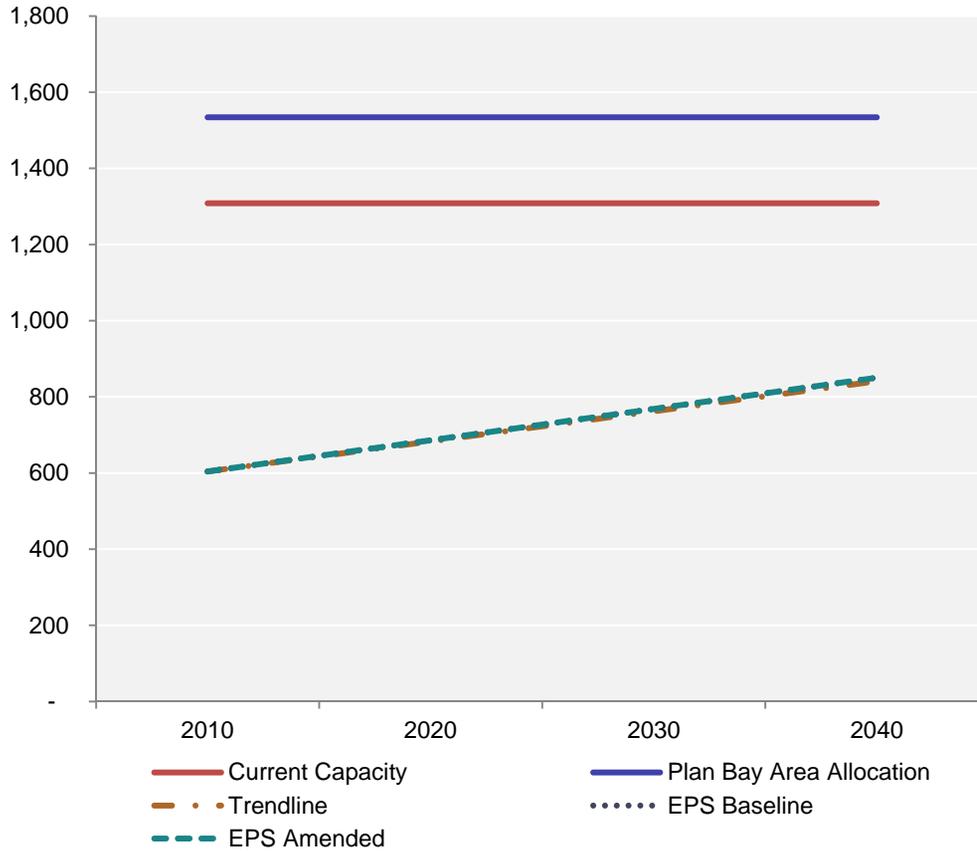
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Master Development Plan Initial Study completed in 2006, and a Specific Plan is currently underway with completion expected in 2016. City seeks to preserve flexibility for development in the upcoming EIR for this area.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Ample opportunity sites exist without displacement of existing residential.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City Council has been supportive of higher density development concepts and infill, but hasn't materialized due to market constraints.	
		2	History of neighborhood opposition	0.05	0.00	0.00	Rivertown Preservation Society seeks more downtown shopping and amenities, may push for lower density housing scenario. <b>Amended scenario assumes agreement is reached for moderate density scenario rather than low.</b>	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.35	0.20	City has little recent history of infill development, as most recent product has been detached homes in large subdivisions. Unlike at Hillcrest PDA, development in this PDA would be subject to the City's growth management plan limiting housing development to 600 units/year without discretionary action.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	City reports no units in the current pipeline.	
		3	General Market Conditions	0.10	0.10	0.10	Antioch's median household incomes have been stagnant, and large households (5+ people) have grown much faster than average, reflecting the City's appeal to suburban family market rather than households seeking higher density housing types (the market anticipated in the Specific Plan). Antioch home prices decreased significantly after 2006 peak, and have not fully recovered. City issued an RFP for a 4-acre parcel for housing or hotel, and received no responses.	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Achievable prices for higher density products are unlikely to support new construction. Lower density products should be feasible, but market depth at this location may be an issue.	

**Table A-4. Antioch: Rivertown Waterfront**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.05	0.05	0.00	Parcels are generally of reasonable scale for development, but infill location does create some parcelization/assembly issues. <b>Restoration of parcel assembly tools may alleviate this constraint in amended scenario.</b>
		6	Existence of major investment disincentives		0.05	0.05	0.05	Crime rate is worse than surrounding area (exacerbated by reduction in forces), and schools are considered to be underperforming vs. adjacent communities. The general fiscal weakness of the City is also considered a deterrent to investment.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	No major investments are believed to be required in this PDA.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has impact fees that would apply to this PDA.
		3	PDA financing capacity		0.05	0.05	0.00	General feasibility challenge suggests that even a modest impact fee burden may discourage growth in this PDA. <b>External funding for infrastructure and/or reduction in impact fees may enhance feasibility and yield in amended scenario.</b>

# Benicia: Downtown

Total Housing Units ( Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
930	704	246	26%	Modest pricing and limited site capacity	246	26%	No amendments proposed

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-5. Benicia: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	704				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				930	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(226)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		704	704	704	
		6	Sum of Capacity Constraint Coefficients		0.90	0.75	0.65	
			<i>Planning and Entitlement Criteria</i>		0.10	0.10	0.20	
			<i>Community Support</i>		0.10	0.10	0.10	
			<i>Market and Investment Attractiveness</i>		0.55	0.35	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.20	0.20	
		7	EPS estimate of housing production given constraints		70	176	246	
		8	Percentage of PDA 2040 housing allocation accommodated		7.6%	18.9%	26.5%	
			Summary	The lack of development capacity, regulatory constraints, public opposition to higher density residential and the limited public transit options all limit potential development.				

**Table A-5. Benicia: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	Downtown is largely zoned for "mixed use" but no area plan is in place and no comprehensive EIR	
		2	Displacement of existing stable residential neighborhoods	0.00	0.10	0.20	Yes, plan area is largely residential after available opportunity sites are utilized	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	None noted.	
		2	History of neighborhood opposition	0.10	0.10	0.10	Public has resisted attempts to alter the Downtown "historic district" designation and character with higher density development	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.35	0.20	0.00	Very limited development in recent years	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	None noted.	
		3	General Market Conditions	0.05	0.05	0.00	Market preferences for single family and attached single family remain. Demand and pricing for mixed use/multifamily will improve over the forecast period.	
		4	Financial Feasibility Constraint	0.05	0.05	0.05	Mixed use/multifamily development in Benicia will face financial feasibility constraints given site-related costs and pricing constraints in the near to mid term.	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.10	0.10	Existing parking and roadway (LOS) will be strained by new development	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.00	0.00	No financing plan in place.	
		3	PDA financing capacity	0.05	0.10	0.10	Very low capacity to fund infrastructure due to the low development potential	

**Table A-5. Benicia: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	704				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				930	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(226)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		704	704	704	
		6	Sum of Capacity Constraint Coefficients		0.90	0.75	0.65	
			<i>Planning and Entitlement Criteria</i>		0.10	0.10	0.20	
			<i>Community Support</i>		0.10	0.10	0.10	
			<i>Market and Investment Attractiveness</i>		0.55	0.35	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.20	0.20	
		7	EPS estimate of housing production given constraints		70	176	246	
		8	Percentage of PDA 2040 housing allocation accommodated		7.6%	18.9%	26.5%	
			<b>Summary</b>	The lack of development capacity, regulatory constraints, public opposition to higher density residential and the limited public transit options all limit potential development.				
				Few tools are currently available to alleviate these constraints.				

**Table A-5. Benicia: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	Downtown is largely zoned for "mixed use" but no area plan is in place and no comprehensive EIR	
		2	Displacement of existing stable residential neighborhoods	0.00	0.10	0.20	Yes, plan area is largely residential after available opportunity sites are utilized	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	None noted.	
		2	History of neighborhood opposition	0.10	0.10	0.10	Public has resisted attempts to alter the Downtown "historic district" designation and character with higher density development	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.35	0.20	0.00	Very limited development in recent years	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	None noted.	
		3	General Market Conditions	0.05	0.05	0.00	Market preferences for single family and attached single family remain. Demand and pricing for mixed use/multifamily will improve over the forecast period.	
		4	Financial Feasibility Constraint	0.05	0.05	0.05	Mixed use/multifamily development in Benicia will face financial feasibility constraints given site-related costs and pricing constraints in the near to mid term.	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.10	0.10	Existing parking and roadway (LOS) will be strained by new development	
		2	Is there an existing CIP funded or other infrastructure financing plan in	0.05	0.00	0.00	No financing plan in place.	
		3	PDA financing capacity	0.05	0.10	0.10	Very low capacity to fund infrastructure due to the low development potential	



**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,100				The EIR for Berkeley's Downtown Area Plan (DAP) analyzes 3,100 residential units for the plan, which envisions buildout in 2030.
		2	<i>Plan Bay Area</i> new housing allocation				4,150	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,050)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,100	3,100	3,100	
		6	Sum of Capacity Constraint Coefficients		0.60	0.35	0.20	
			<i>Planning and Entitlement Criteria</i>		0.25	0.15	0.05	
			<i>Community Support</i>		0.25	0.20	0.15	
			<i>Market and Investment Attractiveness</i>		0.10	0.00	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,240	2,015	2,480	
		8	Percentage of PDA 2040 housing allocation accommodated		29.9%	48.6%	59.8%	
		Summary		Downtown Berkeley has become a very attractive location for multifamily development in the post-Recession period, with several major projects proposed and under construction and mid- and high-rise development in planning. The City's adopted Downtown Area Plan (DAP) also survived several opposition challenges, including one through an initiative process which failed at the ballot box. While planning and market factors favor development consistent with the 2040 allocation, a segment of community opposition remains which has intensified in the wake of a balcony collapse tragedy which killed six people and seriously injured seven others. In addition to opposition from some in the community, land availability in the DAP and the "build out" analyzed in the DAP EIR limit the number of residential units and limit the number of high-rises allowed in the Plan Area. These key constraints are projected to result in unit-production below the 2040 allocation.				

**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, Downtown Area Plan is in place along with EIR.	
		1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	The City does not anticipate stable residential neighborhoods to be displaced as part of redevelopment Downtown.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have expressed support for the uses and densities which would prioritize development in the Downtown.	
		2	History of neighborhood opposition	0.25	0.20	0.15	Some groups have exhibited significant opposition to tall (over 120 feet) buildings and other types of high-density development, which lead to two voter initiatives to alter the Downtown Area Plan (DAP). Both initiatives lost at the ballot though, which meant that the DAP was approved, allowing up to 5 buildings (2 up to 120 feet and 3 up to 180 feet) Downtown.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.00	0.00	Investment in new housing in Alameda County is recovering since the Recession. The total number of units permitted in the County in 2013 was about 55% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged almost 110 units permitted per year between 1990 and 2013. The PDA would need to average 155 units per year between 2015 and 2040 to achieve its unit-allocation, significantly above the average pace for the whole City over the nearly last 25 years.  Since 2010, one project in the PDA has been completed (about 145 units) and another is under construction (100 units).	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	The City has several projects in the pipeline totaling about 1,050 units, comprising about 25% of the PDA allocation.	

**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and median household income in the City is higher than the Bay Area-average, though median household income in the PDA area is significantly below the Bay Area average, likely because of the large number of UC Berkeley students and lower-income multifamily housing in and around the PDA. Population grew about 40% since 2000 in the PDA, significantly about the roughly 7% rate Bay Area-wide.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: more than \$4.00 per sq.ft. per month for apartments and \$520 per square foot for condos. These apartment rents and condo prices are more than sufficient to justify multifamily development and development pipeline are indicative of this demand. Note that the DAP allows for up to five buildings taller than 75 feet. The strong market conditions in Berkeley are expected to support this type of development.	
		5	Parcel size and configuration	0.00	0.00	0.00	Many parcels are small but of sufficient size to spur development, given the strong market conditions at this time.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives for investment in the PDA have been identified at this time.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Infrastructure capacity expansions including for additional open space and multimodal street improvements are needed. Immediate improvements are not needed, however, in advance of new development occurring.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has a improvements identified for the Downtown Area Plan and various impact fees in place to fund improvements.	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA has sufficient financing capacity to meet the needs of new development.	

**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,100				The EIR for Berkeley's Downtown Area Plan (DAP) analyzes 3,100 residential units for the plan, which envisions buildout in 2030.
		2	<i>Plan Bay Area</i> new housing allocation				4,150	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,050)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	In the amended scenario, the City of Berkeley is assumed to update the DAP and EIR, allowing for additional residential units in the plan area.
		5	Estimated gross housing capacity at each period		3,100	3,100	3,410	
		6	Sum of Capacity Constraint Coefficients		0.60	0.35	0.10	
			<i>Planning and Entitlement Criteria</i>		0.25	0.15	0.00	
			<i>Community Support</i>		0.25	0.20	0.10	
			<i>Market and Investment Attractiveness</i>		0.10	0.00	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,240	2,015	3,069	
		8	Percentage of PDA 2040 housing allocation accommodated		29.9%	48.6%	74.0%	
		Summary		<p>Downtown Berkeley has become a very attractive location for multifamily development in the post-Recession period, with several major projects proposed and under construction and mid- and high-rise development in planning. The City's adopted Downtown Area Plan (DAP) also survived several opposition challenges, including one through an initiative process which failed at the ballot box. While planning and market factors favor development consistent with the 2040 allocation, a segment of community opposition remains which has intensified in the wake of a balcony collapse tragedy which killed six people and seriously injured seven others. In addition to opposition from some in the community, land availability in the DAP and the "build out" analyzed in the DAP EIR limit the number of residential units and limit the number of high-rises allowed in the Plan Area. These key constraints are projected to result in unit-production below the 2040 allocation.</p> <p>In the amended scenario, the DAP is assumed to be updated to allow additional residential growth, community opposition is assumed to be slightly less effective in the out-years of the DAP, and the entitlement process is assumed to be somewhat shorter, also in the out-years of the DAP.</p>				

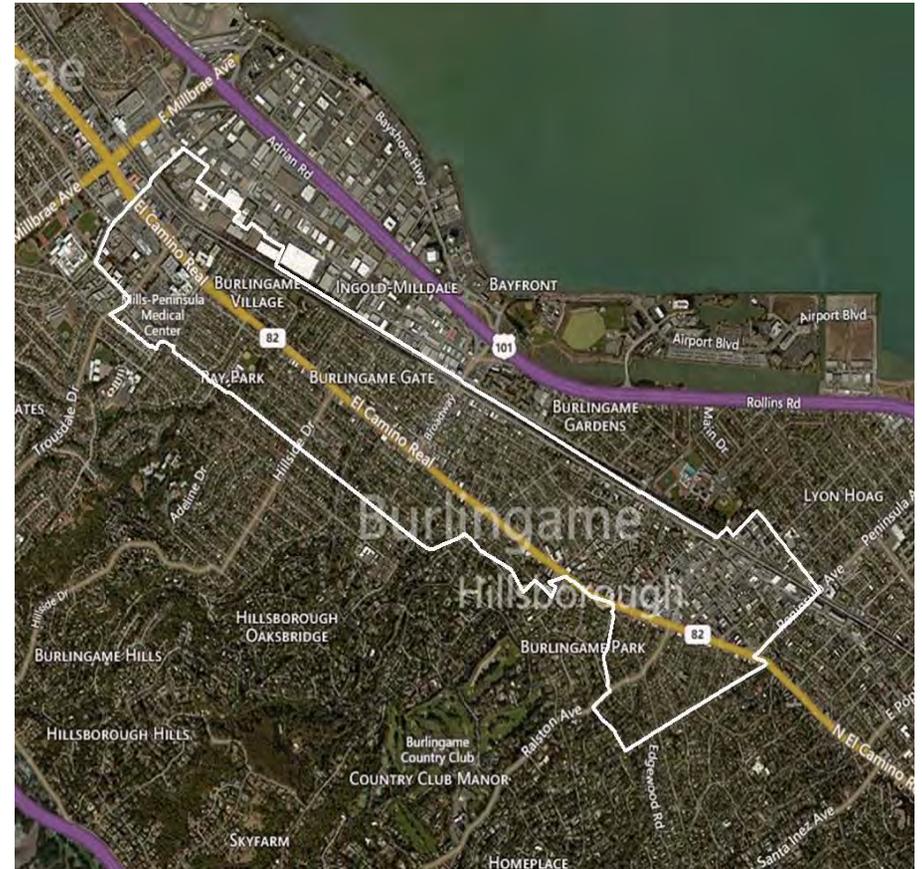
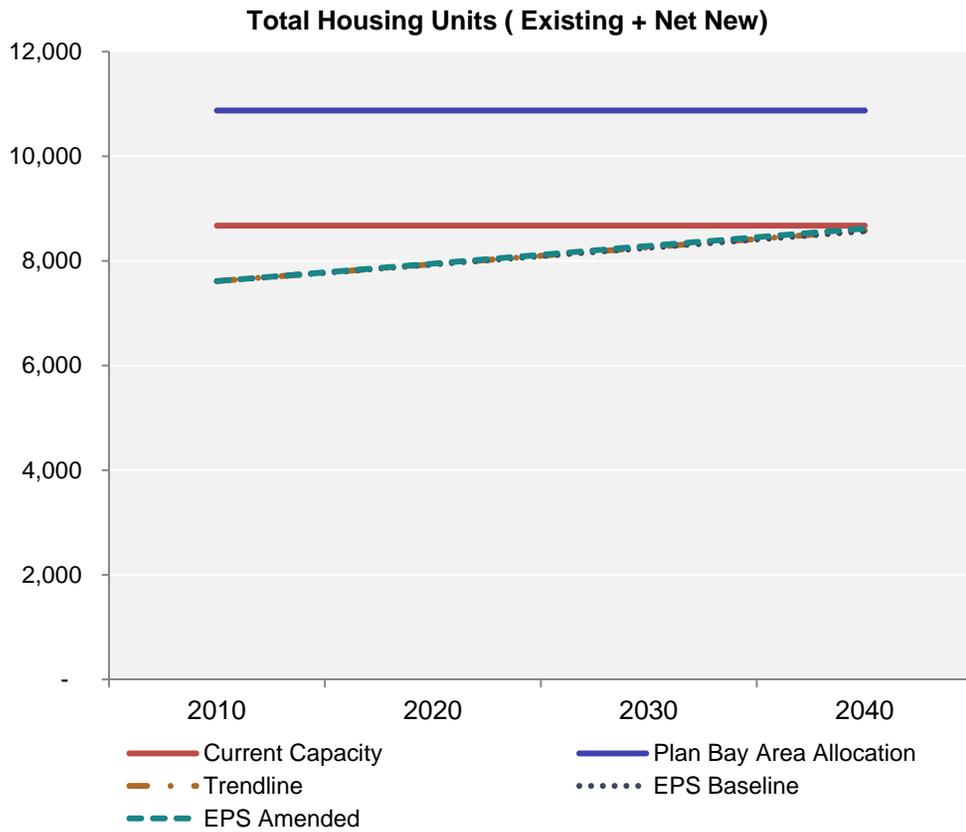
**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, Downtown Area Plan is in place along with EIR.	
		1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	The City does not anticipate stable residential neighborhoods to be displaced as part of redevelopment Downtown.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have expressed support for the uses and densities which would prioritize development in the Downtown.	
		2	History of neighborhood opposition	0.25	0.20	0.10	Some groups have exhibited significant opposition to tall (over 120 feet) buildings and other types of high-density development, which lead to two voter initiatives to alter the Downtown Area Plan (DAP). Both initiatives lost at the ballot though, which meant that the DAP was approved, allowing up to 5 buildings (2 up to 120 feet and 3 up to 180 feet) Downtown.  <i>In the amended scenario, community opposition to dense development is assumed to lessen in the out-years of the DAP, as projects are constructed.</i>	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.00	0.00	Investment in new housing in Alameda County is recovering since the Recession. The total number of units permitted in the County in 2013 was about 55% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged almost 110 units permitted per year between 1990 and 2013. The PDA would need to average 155 units per year between 2015 and 2040 to achieve its unit-allocation, significantly above the average pace for the whole City over the nearly last 25 years.  Since 2010, one project in the PDA has been completed (about 145 units) and another is under construction (100 units).	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	The City has several projects in the pipeline totaling about 1,050 units, comprising about 25% of the PDA allocation.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and median household income in the City is higher than the Bay Area-average, though median household income in the PDA area is significantly below the Bay Area average, likely because of the large number of UC Berkeley students and lower-income multifamily housing in and around the PDA. Population grew about 40% since 2000 in the PDA, significantly about the roughly 7% rate Bay Area-wide.	

**Table A-6. Berkeley: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: more than \$4.00 per sq.ft. per month for apartments and \$520 per square foot for condos. These apartment rents and condo prices are more than sufficient to justify multifamily development and development pipeline are indicative of this demand. Note that the DAP allows for up to five buildings taller than 75 feet. The strong market conditions in Berkeley are expected to support this type of development.	
		5	Parcel size and configuration	0.00	0.00	0.00	Many parcels are small but of sufficient size to spur development, given the strong market conditions at this time.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives for investment in the PDA have been identified at this time.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Infrastructure capacity expansions including for additional open space and multimodal street improvements are needed. Immediate improvements are not needed, however, in advance of new development occurring.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has a improvements identified for the Downtown Area Plan and various impact fees in place to fund improvements.	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA has sufficient financing capacity to meet the needs of new development.	

# Burlingame: Burlingame El Camino Real



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,260	1,060	954	29%	Infill parcelization and single-family adjacency to El Camino limit taller development	1,007	31%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,060				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,260	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,200)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,060	1,060	1,060	
		6	Sum of Capacity Constraint Coefficients		0.25	0.15	0.10	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.25	0.15	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		795	901	954	
		8	Percentage of PDA 2040 housing allocation accommodated		24.4%	27.6%	29.3%	
			<b>Summary</b>	The City of Burlingame has adopted two specific plans applicable to the PDA - the Downtown Specific Plan and the North Burlingame/ Rollins Specific Plan; El Camino Real is zoned largely to allow multifamily development. With planning and environmental analysis largely in plan and demand for housing in the area, the key impediments to multifamily development in the City are (1) the small number of vacant and underutilized parcels in the PDA; (2) opposition to multifamily projects from adjacent single-family neighborhoods (particularly near El Camino Real); and financial feasibility constraints in achieving dense development on the small parcels. The lack of available land and the difficulty in achieving the maximum density available on sites near established single-family neighborhoods mean that the projected growth is significantly below the 2040 unit allocation.				

**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the City has an adopted Downtown Specific Plan (DSP) for the southern portion of the PDA, a North Burlingame/ Rollins Specific Plan for the northern portion of the PDA, and the middle section along El Camino Real is zoned largely for multifamily residential.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.05	Some displacement of older housing may occur, particularly along El Camino Real.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have generally been supportive of the PDA designation and higher density development within its boundaries.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Opposition to projects is typically confined to nearby neighbors, rather than a citywide, anti-development-type of opposition.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	<p>Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.</p> <p>The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average 130 units per year between 2015 and 2040 to achieve its unit-allocation, a significant increase from the last 20 years.</p> <p>Multifamily housing permits in Burlingame have comprised 60% of total housing starts since 1980 which is higher to the proportion for San Mateo County, about 50%.</p>	

**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
		2	Recent Local Development Activity (pipeline)	0.20	0.10	0.00	There were about 10 units built in the PDA between 2010 and 2015; currently there are about 110 units under construction and almost 150 units in the pipeline. This activity makes up less than 10% of the total unit-allocation to the PDA.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate relatively high sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 57% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$79,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged \$2.85 sq.ft. per month for apartments and \$950 per square foot for condos. These apartment prices are sufficient to justify multifamily development.	
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.05	0.05	0.05	There are very few available parcels in the PDA and many parcels are small and difficult to assemble. In addition, the small number of redevelopment opportunities along El Camino Real abut single-family residential development.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives were identified in the PDA.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure capacity is sufficient for some growth.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has a CIP to accommodate growth in the area and impact fees in place to pay for new development's demand for improvements and upgrades.	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA has sufficient financing capacity to support improvement costs.	

**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,060				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,260	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,200)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,060	1,060	1,060	
		6	Sum of Capacity Constraint Coefficients		0.25	0.10	0.05	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness (continued)</i>		0.25	0.10	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		795	954	1,007	
		8	Percentage of PDA 2040 housing allocation accommodated		24.4%	29.3%	30.9%	
			Summary	<p>The City of Burlingame has adopted two specific plans applicable to the PDA - the Downtown Specific Plan and the North Burlingame/ Rollins Specific Plan; El Camino Real is zoned largely to allow multifamily development. With planning and environmental analysis largely in plan and demand for housing in the area, the key impediments to multifamily development in the City are (1) the small number of vacant and underutilized parcels in the PDA; (2) opposition to multifamily projects from adjacent single-family neighborhoods (particularly near El Camino Real); and financial feasibility constraints in achieving dense development on the small parcels. The lack of available land and the difficulty in achieving the maximum density available on sites near established single-family neighborhoods mean that the projected growth is significantly below the 2040 unit allocation.</p> <p><b>In the amended scenario, the City or another entity has tools to assemble parcels for redevelopment and multistory building along El Camino Real occurs at a higher rate than in the Baseline scenario.</b></p>				

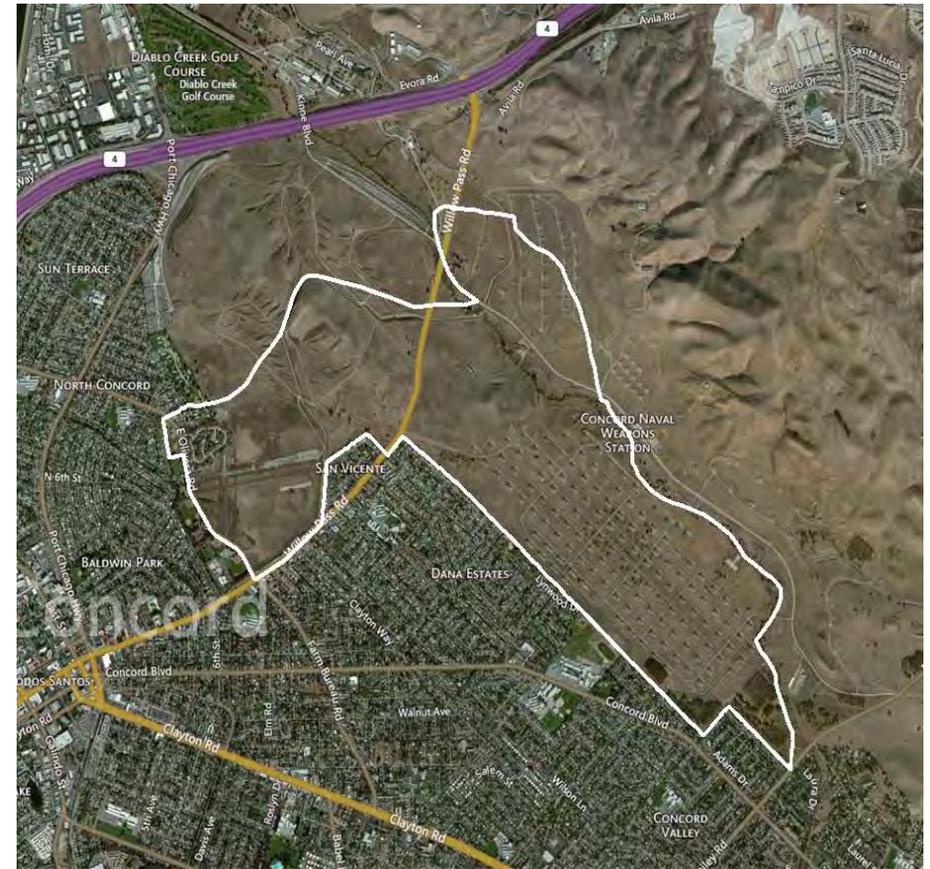
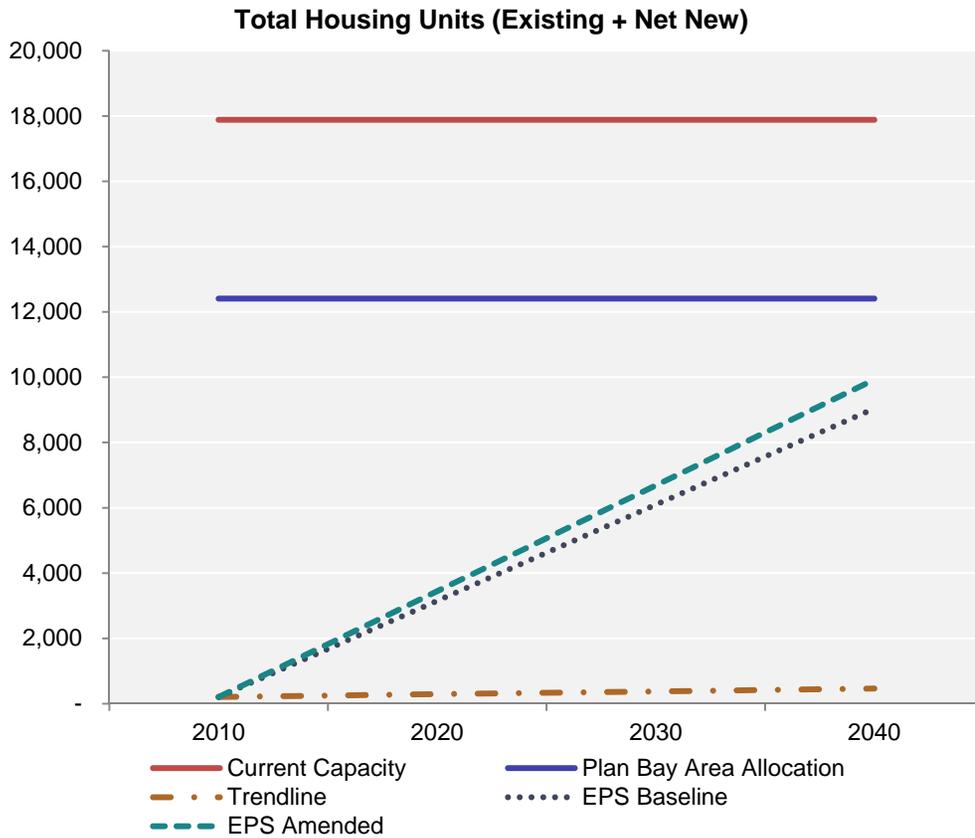
**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the City has an adopted Downtown Specific Plan (DSP) for the southern portion of the PDA, a North Burlingame/ Rollins Specific Plan for the northern portion of the PDA, and the middle section along El Camino Real is zoned largely for multifamily residential.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.05	Some displacement of older housing may occur, particularly along El Camino Real.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have generally been supportive of the PDA designation and higher density development within its boundaries.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Opposition to projects is typically confined to nearby neighbors, rather than a citywide, anti-development-type of opposition.	
		1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.  The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average 130 units per year between 2015 and 2040 to achieve its unit-allocation, a significant increase from the last 20 years.  Multifamily housing permits in Burlingame have comprised 60% of total housing starts since 1980 which is higher to the proportion for San Mateo County, about 50%.	
		2	Recent Local Development Activity (pipeline)	0.20	0.10	0.00	There were about 10 units built in the PDA between 2010 and 2015; currently there are about 110 units under construction and almost 150 units in the pipeline. This activity makes up less than 10% of the total unit-allocation to the PDA.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate relatively high sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 57% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$79,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged:\$2.85 sq.ft. per month for apartments and \$950 per square foot for condos. These apartment prices are sufficient to justify multifamily development.	

**Table A-7. Burlingame: Burlingame El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.05	0.00	0.00	There are very few available parcels in the PDA and many parcels are small and difficult to assemble. In addition, the small number of redevelopment opportunities along El Camino Real abut single-family residential development.  <i>In the amended scenario, the City or another entity has tools available to assemble parcels for redevelopment.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives were identified in the PDA.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure capacity is sufficient for some growth.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has a CIP to accommodate growth in the area and impact fees in place to pay for new development's demand for improvements and upgrades..	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA has sufficient financing capacity to support improvement costs.	

# Concord: Community Reuse Area/Los Medanos



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
12,202	17,680	8,840	72%	Modest pricing, comprehensive infrastructure needs, faster absorption required than historically achieved	9,724	80%	Infrastructure resources available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-8. Concord: Community Reuse Area/Los Medanos**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	17,680				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Note that two developer proposals now under review by the City include 4,200 units and 5,900 units in 'Phase 1' of the project which fully overlaps with PDA "CON1_a" and includes portions of PDA "CON1_b". CON1_a is allocated about 3,250 units by 2040 and CON1_b is allocated about 8,950 units.
		2	Plan Bay Area new housing allocation				12,202	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	5,478				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	The City has adopted a Reuse Plan and a Final EIR for the Naval Weapons Station (NWS) which includes land uses and densities that accommodate the number of units allocated to the PDA in Plan Bay Area. Two developer proposals for the Reuse Area (also called the Naval Weapons Station - NWS) are currently under review for Phase 1 of the project. Changes are likely to occur as negotiations continue through 2015 and 2016 but it is unlikely that increases in density are likely to occur.
		5	Estimated gross housing capacity at each period		17,680	17,680	17,680	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.50	
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.35	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.25	0.15	
		7	EPS estimate of housing production given constraints		884	5,304	8,840	
		8	Percentage of PDA 2040 housing allocation accommodated		7.2%	43.5%	72.4%	
			Summary	The Community Reuse Area in Concord (formerly the Concord Naval Weapons Station) is a large PDA with significant capacity for new housing and commercial development. The area has already undergone a comprehensive community planning process. The selected developer for the site will still need to complete more detailed planning for the large-site and project level EIR. Impediments to meeting the 2040 allocation include: a complicated negotiation process with multiple agencies involved (City and Navy) and extensive infrastructure upgrades and public facilities needed. In addition, the large number of units in the three PDAs in Concord would mean that the City would need to absorb about two times the number of units they have absorbed, on average, over the last 30 years. The historic and projected pace of development means that the this PDA will likely fall short of meeting its residential unit allocation by 2040.				

**Table A-8. Concord: Community Reuse Area/Los Medanos**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	No, the City is currently in negotiations with two developers for phase 1 of the property. That process and the accompany planning document and environmental approvals are expected to be completed prior to the 2020 horizon evaluated here.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Few units currently exist in the PDAs. No displacement envisioned.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of Concord has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	The Reuse planning effort spanned multiple years and included a significant amount of community involvement. In addition, the reuse area borders some existing neighborhoods but will largely be a completely new district in the City. While there is certainly a significant amount of interest in this major redevelopment in the City, the thorough and lengthy community process for the Reuse Plan and the now ongoing, public developer-selection process is likely to lessen opposition to development, once construction begins.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	<p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 260 units permitted per year between 1980 and 2013. The PDAs would need to average 450 units per year between 2015 and 2040 to achieve the unit-allocation. The three PDAs in the City of Concord would need to average more than 600 units per year to reach the 2040 allocation.</p> <p>Multifamily housing starts in Concord have comprised 35% of total housing starts since 1980 which is higher to the proportion for Contra Costa County 30%.</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1980 and 2013 to reach the allocation.</p>	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	The City is in the midst of a developer selection process and has selected two developers for continued negotiations. Negotiations are likely to continue through 2016	

**Table A-8. Concord: Community Reuse Area/Los Medanos**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.20	0.20	0.20	Educational attainment and household income of existing PDA residents indicate weak market conditions. The proportion of PDA residents with 4-year college degree or higher was 27% in 2012 compared with 43% Bay Area-wide. Household income in the PDA was \$59,000 in the same year compared with \$80,300 Bay Area-wide. However, population growth and percent change in growth in multifamily units since 2000 in the PDA both exceeded the same indicators for the Bay Area.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Developer pro formas submitted as part of the selection process indicate that the size and scale of this project will be a "market-maker", meaning that new community branding will contribute to market pricing above the values currently found in proximity to the site.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcels included as opportunity sites in the capacity analysis are very large and can readily be configured into efficient, developable sites.	
		6	Existence of major investment disincentives	0.05	0.00	0.00	Developers are currently engaged in a multistep, competitive process to win exclusive negotiating rights to the property. The major disincentives for investment in the area are: complicated process with multiple-agency approvals and involvement (City and Navy), comprehensive and new infrastructure required for development, and need for high-quality neighborhood services and amenities (parks, schools) to command the high-end home prices required to support development.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.00	Existing infrastructure is not sufficient to support new development at the site.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Both developers vying for development rights have detailed draft plans for funding infrastructure. They largely rely on developer debt and equity, land secured financing, and public financing	
		3	PDA financing capacity	0.15	0.15	0.15	Developer proposals being considered describe financeable and financially feasible projects. However, infrastructure costs for the former Naval Weapons Station are significant, ranging from \$750 million to \$1.5 billion, depending on the number of phases and the nature of the developer proposal being evaluated. These costs will be a significant burden on development, meaning buildout will only occur as real estate values grow to support the costs.	

**Table A-8. Concord: Community Reuse Area/Los Medanos**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	17,680				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Note that two developer proposals now under review by the City include 4,200 units and 5,900 units in 'Phase 1' of the project which fully overlaps with PDA "CON1_a" and includes portions of PDA "CON1_b". CON1_a is allocated about 3,250 units by 2040 and CON1_b is allocated about 8,950 units.	
		2	Plan Bay Area new housing allocation				12,202	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	5,478					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		The City has adopted a Reuse Plan and a Final EIR for the Naval Weapons Station (NWS) which includes land uses and densities that accommodate the number of units allocated to the PDA in Plan Bay Area. Two developer proposals for the Reuse Area (also called the Naval Weapons Station - NWS) are currently under review for Phase 1 of the project. Changes are likely to occur as negotiations continue through 2015 and 2016 but it is unlikely that increases in density are likely to occur.
		5	Estimated gross housing capacity at each period		17,680	17,680	17,680		
		6	Sum of Capacity Constraint Coefficients		0.95	0.65	0.45		
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.35		
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.20	0.10				
7	EPS estimate of housing production given constraints		884	6,188	9,724				
8	Percentage of PDA 2040 housing allocation accommodated		7.2%	50.7%	79.7%				
	Summary		<p>The Community Reuse Area in Concord (formerly the Concord Naval Weapons Station) is a large PDA with significant capacity for new housing and commercial development. The area has already undergone a comprehensive community planning process. The selected developer for the site will still need to complete more detailed planning for the large-site and project level EIR. Impediments to meeting the 2040 allocation include: a complicated negotiation process with multiple agencies involved (City and Navy) and extensive infrastructure upgrades and public facilities needed. In addition, the large number of units in the three PDAs in Concord would mean that the City would need to absorb about two times the number of units they have absorbed, on average, over the last 30 years. The historic and projected pace of development means that the this PDA will likely fall short of meetings its residential unit allocation by 2040.</p> <p style="color: red;">As an amendment, public infrastructure funding and financing is assumed to increase the feasibility of the fully, new-development funded plan assumed in the Baseline version.</p>						

**Table A-8. Concord: Community Reuse Area/Los Medanos**

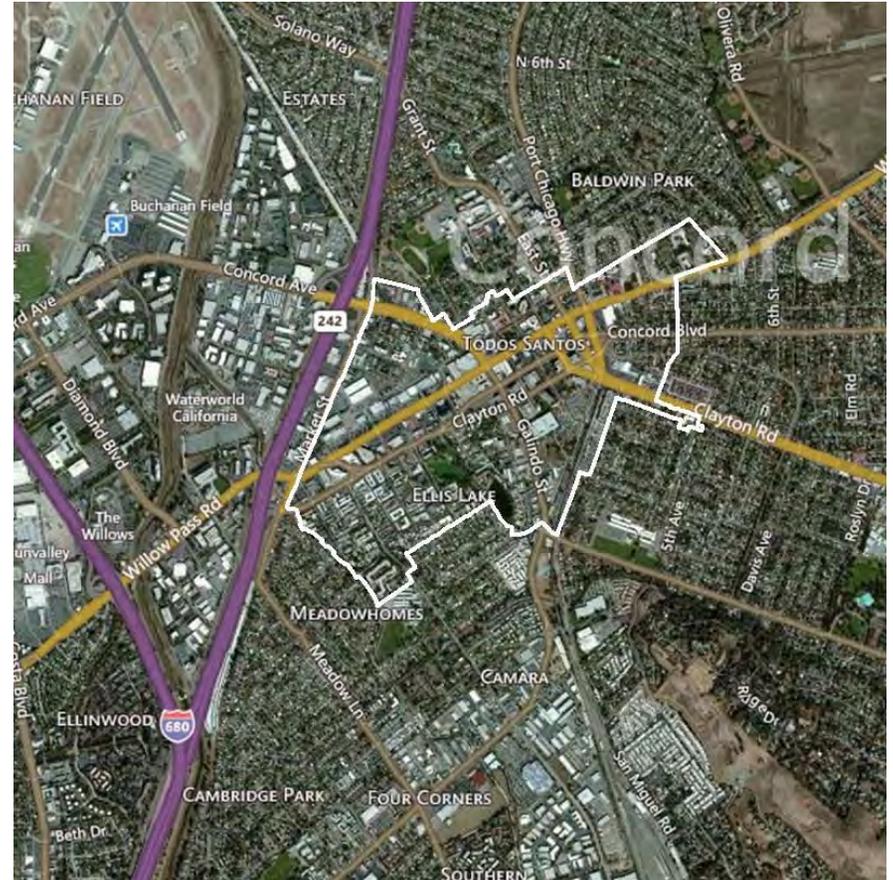
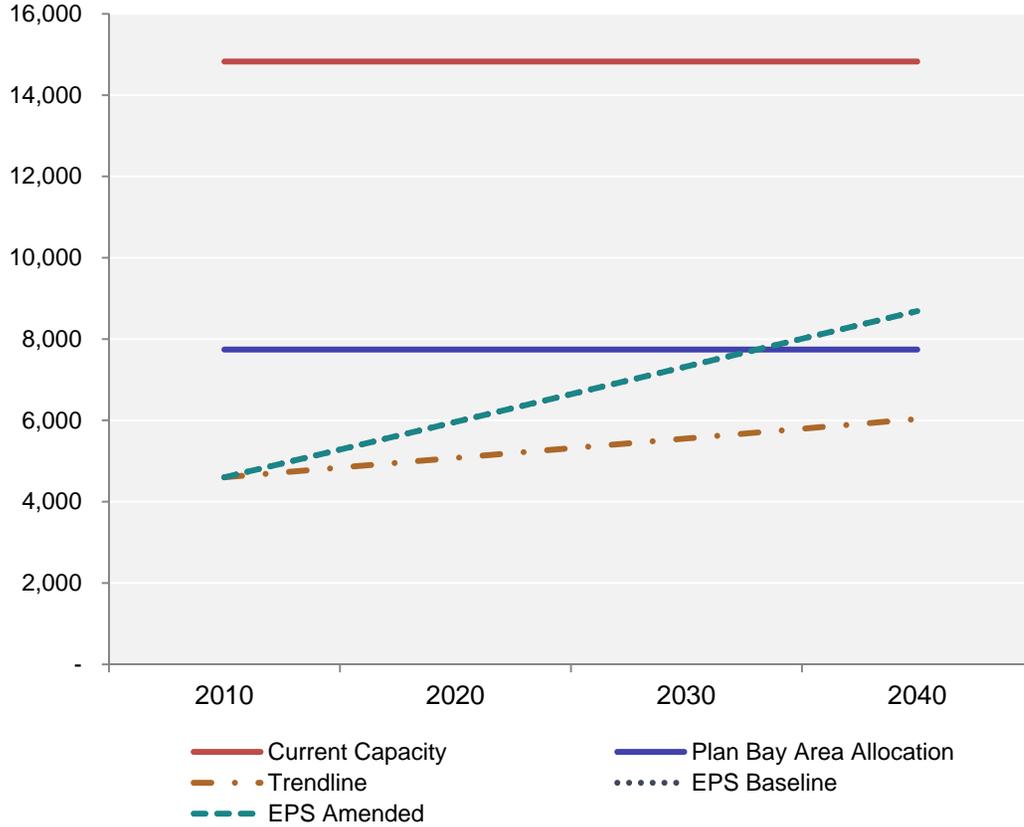
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	No, the City is currently in negotiations with two developers for phase 1 of the property. That process and the accompany planning document and environmental approvals are expected to be completed prior to the 2020 horizon evaluated here.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Few units currently exist in the PDAs. No displacement envisioned.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of Concord has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	The Reuse planning effort spanned multiple years and included a significant amount of community involvement. In addition, the reuse area borders some existing neighborhoods but will largely be a completely new district in the City. While there is certainly a significant amount of interest in this major redevelopment in the City, the thorough and lengthy community process for the Reuse Plan and the now ongoing, public developer-selection process is likely to lessen opposition to development, once construction begins.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.20	0.20	<p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 260 units permitted per year between 1980 and 2013. The PDAs would need to average 450 units per year between 2015 and 2040 to achieve the unit-allocation. The three PDAs in the City of Concord would need to average more than 600 units per year to reach the 2040 allocation.</p> <p>Multifamily housing starts in Concord have comprised 35% of total housing starts since 1980 which is higher to the proportion for Contra Costa County 30%.</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1980 and 2013 to reach the allocation.</p>	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	The City is in the midst of a developer selection process and has selected two developers for continued negotiations. Negotiations are likely to continue through 2016	

**Table A-8. Concord: Community Reuse Area/Los Medanos**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.20	0.15	0.10	Educational attainment and household income of existing PDA residents indicate weak market conditions. The proportion of PDA residents with 4-year college degree or higher was 27% in 2012 compared with 43% Bay Area-wide. Household income in the PDA was \$59,000 in the same year compared with \$80,300 Bay Area-wide. However, population growth and percent change in growth in multifamily units since 2000 in the PDA both exceeded the same indicators for the Bay Area.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Developer pro formas submitted as part of the selection process indicate that the size and scale of this project will be a "market-maker", meaning that new community branding will contribute to market pricing above the values currently found in proximity to the site.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcels included as opportunity sites in the capacity analysis are very large and can readily be configured into efficient, developable sites.	
		6	Existence of major investment disincentives	0.05	0.00	0.00	Developers are currently engaged in a multistep, competitive process to win exclusive negotiating rights to the property. The major disincentives for investment in the area are: complicated process with multiple-agency approvals and involvement (City and Navy), comprehensive and new infrastructure required for development, and need for high-quality neighborhood services and amenities (parks, schools) to command the high-end home prices required to support development.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.00	Existing infrastructure is not sufficient to support new development at the site.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Both developers vying for development rights have detailed draft plans for funding infrastructure. They largely rely on developer debt and equity, land secured financing, and public financing	
		3	PDA financing capacity	0.15	0.10	0.10	Developer proposals being considered describe financeable and financially feasible projects. However, infrastructure costs for the former Naval Weapons Station are significant, ranging from \$750 million to \$1.5 billion, depending on the number of phases and the nature of the developer proposal being evaluated. These costs will be a significant burden on development, meaning buildout will only occur as real estate values grow to support the costs.	
<i>Amended scenario assumes some external funding sources are provided to assist with infrastructure financing.</i>								

# Concord: Downtown

**Total Housing Units (Existing + Net New)**



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,140	10,227	4,091	130%	Feasibility issues at podium development types and infill parcelization	4,091	130%	No amendments proposed

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-9. Concord: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	10,227				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,140	This number refers to the increment of new housing allocated to the PDA in <i>Plan Bay Area</i> .
		3	Capacity surplus or (shortfall)	7,087				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Downtown Concord has a newly adopted Specific Plan and the City recently updated its Zoning Ordinance, both of which provide flexibility in terms of allowable densities and uses. Additional changes in capacity through policy are not anticipated at this time.
		5	Estimated gross housing capacity at each period		10,227	10,227	10,227	
		6	Sum of Capacity Constraint Coefficients		0.90	0.75	0.60	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.90	0.75	0.60	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,023	2,557	4,091	
		8	Percentage of PDA 2040 housing allocation accommodated		32.6%	81.4%	130.3%	
		<b>Summary</b>		Concord recently adopted relatively generous zoning standards Downtown along with a Specific Plan to guide amenities and improvements to the Downtown area which will connect the Concord BART station to the historic Todos Santos Square. Concord's downtown PDA has the necessary physical and policy capacity to accommodate multifamily and mixed-use development that exceeds the <i>Plan Bay Area</i> allocation. The development pipeline includes two large apartment projects, though one project has been approved for several years without moving to the building-permit stage. While working on promoting new development Downtown, the City is also working on negotiations with developers for a major, multiphase project near the North Concord BART station (see other Concord PDA in this report). With two major redevelopment areas, the City's ability to absorb a significant number of new units and the financial feasibility of multifamily development will be the main barriers to absorption. Nonetheless, the planning in place and the availability of vacant and underutilized land in the Downtown mean that absorption of the PDA allocation is likely to occur by 2040.				

**Table A-9. Concord: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
B.	Planning and Entitlement Criteria	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, a Downtown Specific Plan has been adopted along with a Supplemental EIR to the General Plan's EIR.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None of the existing residential units in Downtown Concord are presumed to be redeveloped nor need to be redeveloped to achieve allocation	
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of Concord has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	There has not been significant and organized neighborhood opposition to pending development proposals or the <i>Plan Bay Area</i> allocations.	
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	<p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 240 units permitted per year between 1980 and 2014. The PDA would need to average 126 units per year between 2015 and 2040 to achieve its unit-allocation. The three PDAs in the City of Concord would need to average more than 600 units per year to reach the 2040 allocation.</p> <p>Multifamily housing starts in Concord have comprised 35% of total housing starts since 1980 which is higher to the proportion for Contra Costa County 30%.</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole.</p>	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 10 percent of the <i>Plan Bay Area</i> allocation is met with pending project applications in Downtown Concord. The City is also planning a developer solicitation process to dispose of a site adjacent to the BART parking lot for residential/residential mixed-use which would add to this pipeline.	
		3	General Market Conditions	0.30	0.30	0.30	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$43,000 in 2012, compared with \$80,300 Bay Area-wide. However, population growth and percent change in growth in multifamily units since 2000 in the PDA both exceeded the same indicators for the Bay Area.	

**Table A-9. Concord: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint		0.30	0.25	0.20	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.65 per sq.ft. per month for apartments and \$290 per square foot for condos. These apartment prices are nearly sufficient to justify multifamily development and development pipeline indicate that developers' "trended" rents (e.g., anticipated rents at project opening) are sufficient to spur the pre-development activities. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.
		5	Parcel size and configuration		0.00	0.00	0.00	Parcels included as opportunity sites in the capacity analysis are typically larger parcels currently in underutilized commercial or industrial uses that will be supplanted over time by residential and mixed use projects
		6	Existence of major investment disincentives		0.10	0.05	0.00	Downtown Concord's image is that of both a quaint center clustered around a historic town square (Todos Santos) but also contends with perceptions of crime and poor schools. Data aggregators characterize Downtown Concord as a safe area, however, many schools in the area scored poorly (source: Trulia, based on crime statistics and Great Schools ratings). The City's Specific Plan's focus on complete streets and improvements in routes from BART to Todos Santos Square seek to improve perceptions of and rates of crime in the locale. Perceptions of schools and educational options in the Downtown are more difficult to address, though the types of housing currently being proposed in the PDA target senior and small households, both of which make housing decisions less according to school performance than larger, family households.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	There is presently inadequate infrastructure to provide for the full <i>Downtown Specific Plan development capacity</i> , which is equivalent to the One Bay Area housing allocation. The Specific Plan notes the need for upgrades to the sanitary sewer system as an example.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The City has implemented a sewer rate charge to fund upgrades. The City has an Off-Site Street Improvement Program impact fee. Voters also passed a sales tax increase to fund street repairs in 2014.  Additional funding from external sources would improve project feasibility and promote pace and perhaps total amount of development.
		3	PDA financing capacity		0.00	0.00	0.00	Financing capacity was not specifically addressed in the Downtown Specific Plan as many of the identified improvements - such as complete streets - are anticipated to be funded as City-funds and external funds become available.  Financing capacity does not address capacity to fund, in one manner or another, affordable housing inclusionary units. The City's affordable housing ordinances require inclusionary units or in lieu fees for for-sale projects and City-assisted rental projects.

**Table A-9. Concord: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	10,227				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,140	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	7,087				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Downtown Concord has a newly adopted Specific Plan and the City recently updated its Zoning Ordinance, both of which provide flexibility in terms of allowable densities and uses. Additional changes in capacity through policy are not anticipated at this time.
		5	Estimated gross housing capacity at each period		10,227	10,227	10,227	
		6	Sum of Capacity Constraint Coefficients		0.90	0.75	0.60	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.90	0.75	0.60	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,023	2,557	4,091	
		8	Percentage of PDA 2040 housing allocation accommodated		32.6%	81.4%	130.3%	
			Summary	<p>Concord recently adopted relatively generous zoning standards Downtown along with a Specific Plan to guide amenities and improvements to the Downtown area which will connect the Concord BART station to the historic Todos Santos Square. Concord's downtown PDA has the necessary physical and policy capacity to accommodate multifamily and mixed-use development that exceeds the <i>Plan Bay Area</i> allocation. The development pipeline includes two large apartment projects, though one project has been approved for several years without moving to the building-permit stage. While working on promoting new development Downtown, the City is also working on negotiations with developers for a major, multiphase project near the North Concord BART station (see other Concord PDA in this report). With two major redevelopment areas, the City's ability to absorb a significant number of new units and the financial feasibility of multifamily development will be the main barriers to absorption. Nonetheless, the planning in place and the availability of vacant and underutilized land in the Downtown mean that absorption of the PDA allocation is likely to occur by 2040.</p> <p>No amendments proposed. This PDA has appropriate planning documents and zoning on place, infrastructure planning and capacity, and political support for intensifying development Downtown. The main impediment to full allocation achievement is the market support for such units and the rate of absorption required to achieve the allocation.</p>				

**Table A-9. Concord: Downtown**

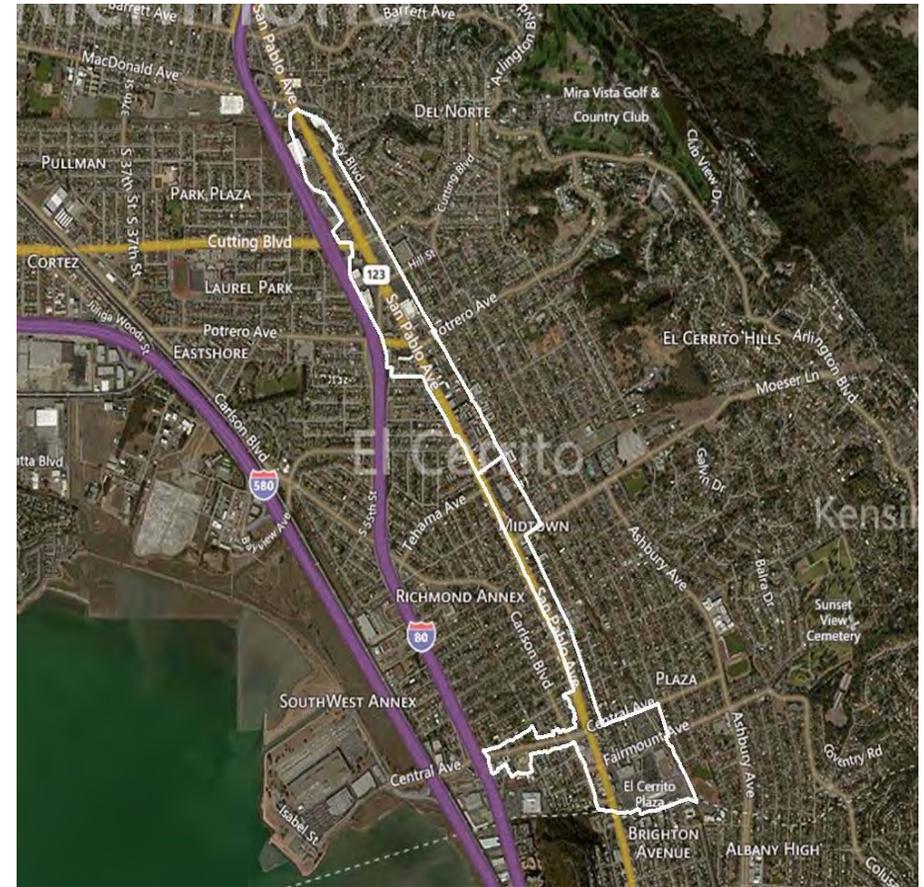
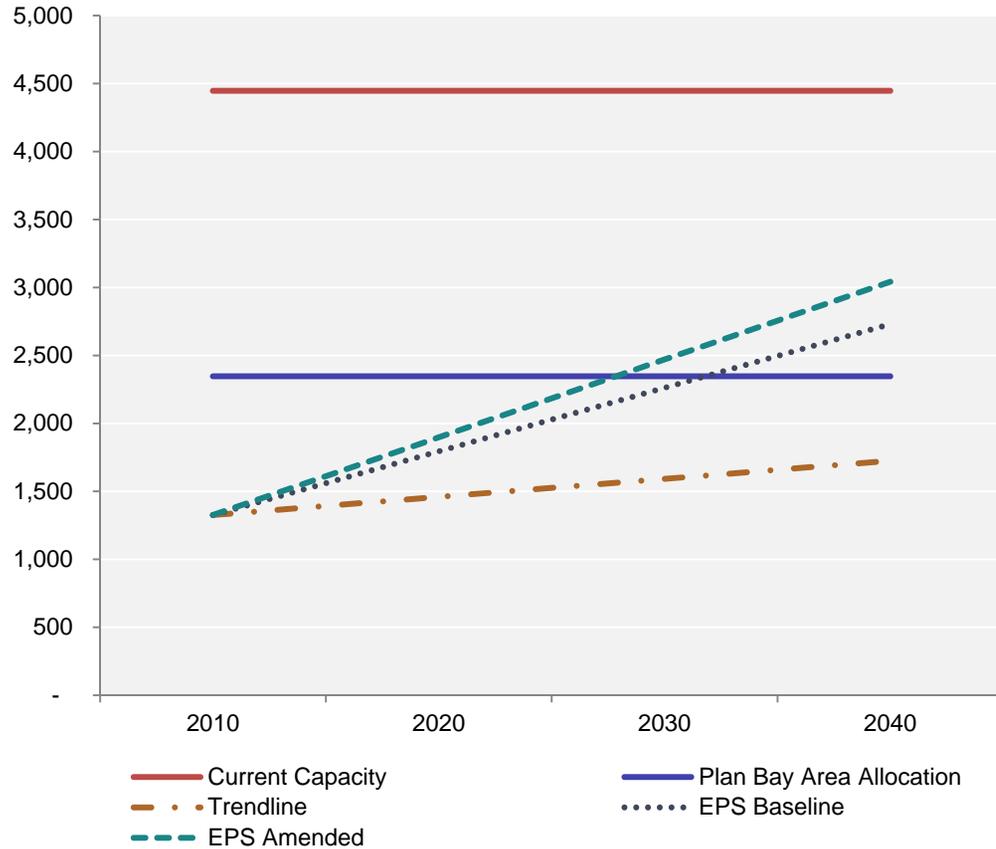
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, a Downtown Specific Plan has been adopted along with a Supplemental EIR to the General Plan's EIR.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None of the existing residential units in Downtown Concord are presumed to be redeveloped nor need to be redeveloped to achieve allocation	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of Concord has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	There has not been significant and organized neighborhood opposition to pending development proposals or the <i>Plan Bay Area</i> allocations	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	<p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 240 units permitted per year between 1980 and 2014. The PDA would need to average 126 units per year between 2015 and 2040 to achieve its unit-allocation. The three PDAs in the City of Concord would need to average more than 600 units per year to reach the 2040 allocation.</p> <p>Multifamily housing starts in Concord have comprised 35% of total housing starts since 1980 which is higher to the proportion for Contra Costa County 30%.</p> <p>Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole.</p>	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 10 percent of the <i>Plan Bay Area</i> allocation is met with pending project applications in Downtown Concord. The City is also planning a developer solicitation process to dispose of a site adjacent to the BART parking lot for residential/residential mixed-use which would add to this pipeline.	
		3	General Market Conditions	0.30	0.30	0.30	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$43,000 in 2012, compared with \$80,300 Bay Area-wide. However, population growth and percent change in growth in multifamily units since 2000 in the PDA both exceeded the same indicators for the Bay Area.	

**Table A-9. Concord: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint		0.30	0.25	0.20	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.65 per sq.ft. per month for apartments and \$290 per square foot for condos. These apartment prices are nearly sufficient to justify multifamily development and development pipeline indicate that developers' "trended" rents (e.g., anticipated rents at project opening) are sufficient to spur the pre-development activities. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.
		5	Parcel size and configuration		0.00	0.00	0.00	Parcels included as opportunity sites in the capacity analysis are typically larger parcels currently in underutilized commercial or industrial uses that will be supplanted over time by residential and mixed use projects
		6	Existence of major investment disincentives		0.10	0.05	0.00	Downtown Concord's image is that of both a quaint center clustered around a historic town square (Todos Santos) but also contends with perceptions of crime and poor schools. Data aggregators characterize Downtown Concord as a safe area, however, many schools in the area scored poorly (source: Trulia, based on crime statistics and Great Schools ratings). The City's Specific Plan's focus on complete streets and improvements in routes from BART to Todos Santos Square seek to improve perceptions of and rates of crime in the locale. Perceptions of schools and educational options in the Downtown are more difficult to address, though the types of housing currently being proposed in the PDA target senior and small households, both of which make housing decisions less according to school performance than larger, family households.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	There is presently inadequate infrastructure to provide for the full <i>Downtown Specific Plan development capacity</i> , which is equivalent to the One Bay Area housing allocation. The Specific Plan notes the need for upgrades to the sanitary sewer system as an example.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The City has implemented a sewer rate charge to fund upgrades. The City has an Off-Site Street Improvement Program impact fee. Voters also passed a sales tax increase to fund street repairs in 2014.  Additional funding from external sources would improve project feasibility and promote pace and perhaps total amount of development.
		3	PDA financing capacity		0.00	0.00	0.00	Financing capacity was not specifically addressed in the Downtown Specific Plan as many of the identified improvements - such as complete streets - are anticipated to be funded as City-funds and external funds become available.  Financing capacity does not address capacity to fund, in one manner or another, affordable housing inclusionary units. The City's affordable housing ordinances require inclusionary units or in lieu fees for for-sale projects and City-assisted rental projects.

# El Cerrito: San Pablo Avenue

**Total Housing Units (Existing + Net New)**



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,020	3,121	1,404	138%	Infill parcelization, value of existing uses	1,717	168%	Parcel redevelopment, circulation improvements, and outside funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,121				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation			1,020		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,101				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,121	3,121	3,121	
		6	Sum of Capacity Constraint Coefficients		0.85	0.70	0.55	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.80	0.65	0.50			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.05			
7	EPS estimate of housing production given constraints		468	936	1,404			
8	Percentage of PDA 2040 housing allocation accommodated		45.9%	91.8%	137.7%			
		<p><b>Summary</b> El Cerrito's PDA is located along the busy San Pablo Avenue thoroughfare and includes two BART stations. The existing land use patterns include lower density, strip commercial, several surface parking lots for BART, and two multifamily apartment complexes, one built in the 1990s and the other in the 2000s. The City adopted a Specific Plan and EIR for the San Pablo corridor which zones more than sufficient land for multifamily development consistent with the PDA's allocation. Pipeline projects include apartment and condo development consistent with the Specific Plan's vision for new development. The main constraints on development in the PDA include irregular and small parcels, existing uses with revenue streams that must be displaced by new development, shallow lots along portions of the corridor, and a need for comparables to be completed to "prove" the market, given the lack of similar development over the last ten years.</p>						

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, El Cerrito adopted in a Specific Plan in 2010 which increased the capac	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Potentially, but not a significant amount.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of planning efforts and for multifamily affordable projects which have come before the council in recent years.	
		2	History of neighborhood opposition	0.00	0.00	0.00	A successful opposition to multifamily is not present in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.20	0.20	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average 32 units per year between 2010 and 2040 to achieve its unit-allocation.	
		2	Recent Local Development Activity (pipeline)	0.20	0.10	0.00	One project under construction, two projects in the near-pipeline, one more in the longer term pipeline.	
		3	General Market Conditions	0.10	0.05	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 45% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$55,000 in 2012, compared with \$80,300 Bay Area-wide.	

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.40 per sq.ft. per month for apartments and \$500 per square foot for condos. These apartment prices are generally sufficient to justify multifamily development.	
		5	Parcel size and configuration	0.15	0.20	0.25	Parcel size and configuration is a major constraint to development along the corridor.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure is generally in good condition.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The Specific Plan includes a CIP.	
		3	PDA financing capacity	0.05	0.05	0.05	The City does not have impact fees in place but rather relies on external funding to provide infrastructure sufficient for intensification.	

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,121				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,020	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,101				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,121	3,121	3,121	
		6	Sum of Capacity Constraint Coefficients		0.75	0.60	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness (continued)</i>		0.75	0.60	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
7	EPS estimate of housing production given constraints		780	1,248	1,717			
8	Percentage of PDA 2040 housing allocation accommodated		76.5%	122.4%	168.3%			
	Summary	<p>El Cerrito's PDA is located along the busy San Pablo Avenue thoroughfare and includes two BART stations. The existing land use patterns include lower density, strip commercial, several surface parking lots for BART, and two multifamily apartment complexes, one built in the 1990s and the other in the 2000s. The City adopted a Specific Plan and EIR for the San Pablo corridor which zones more than sufficient land for multifamily development consistent with the PDA's allocation. Pipeline projects include apartment and condo development consistent with the Specific Plan's vision for new development. The main constraints on development in the PDA include irregular and small parcels, existing uses with revenue streams that must be displaced by new development, shallow lots along portions of the corridor, and a need for comparables to be completed to "prove" the market, given the lack of similar development over the last ten years.</p> <p><b>In an amended scenario, the City or other entity would have parcel tools to assemble property for redevelopment and outside funding for improvements that may be needed, such as circulation improvements for multi-modal streets and preparing surface parking lots for redevelopment.</b></p>						

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

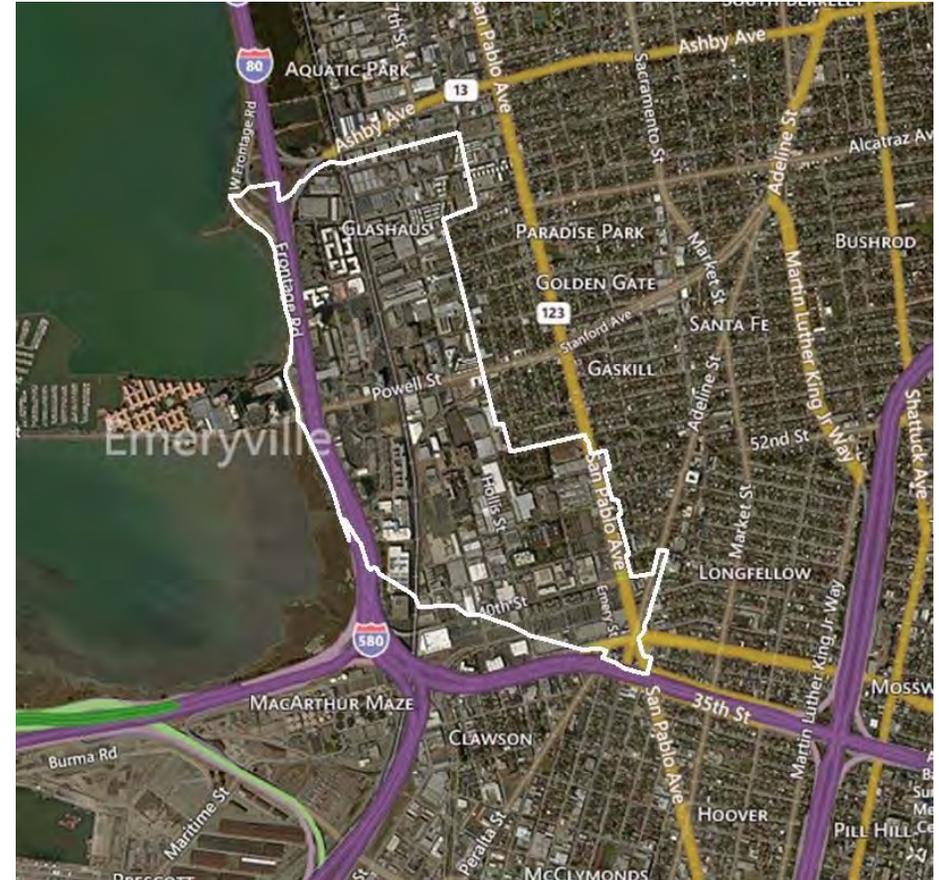
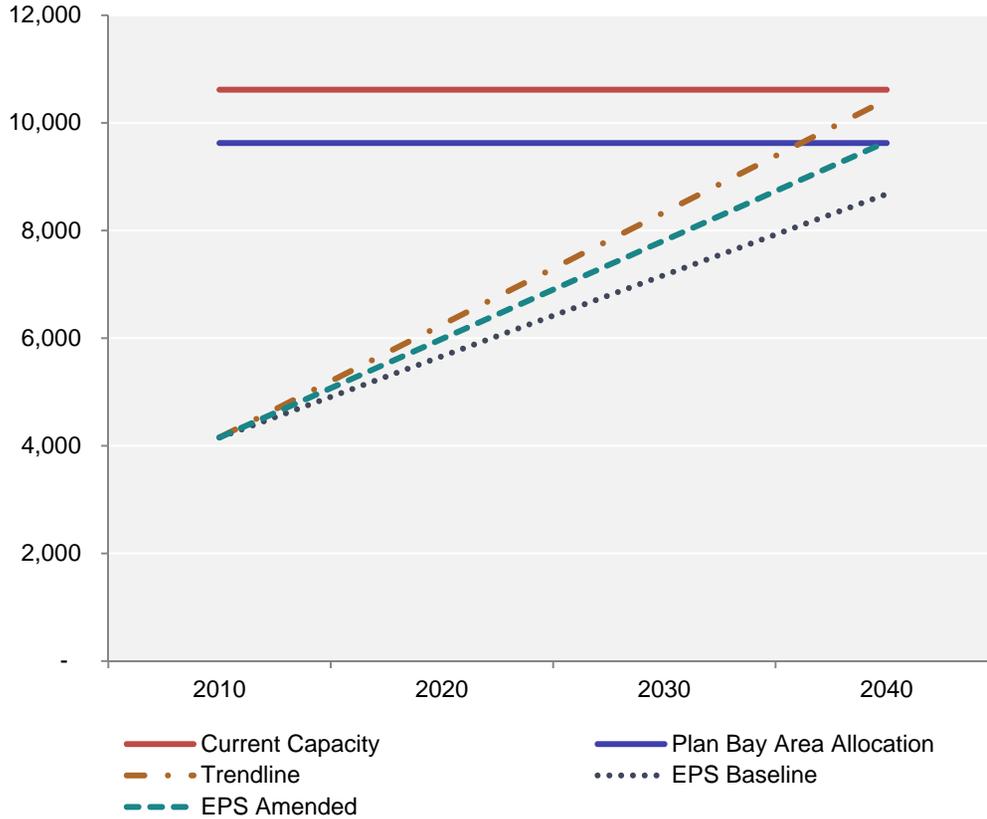
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of planning efforts and for multifamily affordable projects which have come before the council in recent years.	
		2	History of neighborhood opposition	0.00	0.00	0.00	A successful opposition to multifamily is not present in the PDA.	
		1	History of real estate investment in PDA and surrounding city	0.20	0.20	0.20	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average 32 units per year between 2010 and 2040 to achieve its unit-allocation.	
		2	Recent Local Development Activity (pipeline)	0.20	0.10	0.00	One project under construction, two projects in the near-pipeline, one more in the longer term pipeline.	
		3	General Market Conditions	0.10	0.05	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 45% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$55,000 in 2012, compared with \$80,300 Bay Area-wide.	
4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.40 per sq.ft. per month for apartments and \$500 per square foot for condos. These apartment prices are generally sufficient to justify multifamily development.			

**Table A-10. El Cerrito: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.10	0.15	0.20	Parcel size and configuration is a major constraint to development along the corridor.  <i>In an amended scenario, the City or another entity would have tools to assemble parcels for redevelopment.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure is generally in good condition.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The Specific Plan includes a CIP.	
		3	PDA financing capacity	0.00	0.00	0.00	The City does not have impact fees in place but rather relies on external funding to provide infrastructure sufficient for intensification.  <i>In an amended scenario, outside funding and/or new development's contribution ensure sufficiently sized infrastructure is in place.</i>	

# Emeryville: Mixed-Use Core

**Total Housing Units (Existing + Net New)**



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
5,470	6,461	4,523	83%	Community opposition and infill parcelization	5,492	100%	Parcel assembly tools and lessened development opposition

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,461				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				5,470	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	991				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		6,461	6,461	6,461		
		6	Sum of Capacity Constraint Coefficients		0.75	0.45	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.15	0.15	0.15		
			<i>Market and Investment Attractiveness</i>		0.35	0.15	0.10		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.15	0.05		
		7	EPS estimate of housing production given constraints		1,615	3,554	4,523		
		8	Percentage of PDA 2040 housing allocation accommodated		29.5%	65.0%	82.7%		
			Summary	With nearly the whole City located in the PDA, a relatively high-pace of multifamily and other types of development, and a General Plan with zoning largely supportive of dense development types, the City of Emeryville is expected to meet much of its 2040 unit allocation. The main barriers to full achievement of the allocation include: (1) a burgeoning community opposition movement working to downsize or halt new multifamily development; (2) fewer "development" ready sites mean more development will need to take place on sites with existing revenues streams and irregularly shaped sites; and (3) financial feasibility challenges for structured and podium parking will mean that some projects will be developed at lower density levels and produce fewer units per acre than are needed to achieve the allocation.					

**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	PDA boundaries is nearly equal to the City's boundaries, so the City's General Plan is the relevant planning document.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No, displacement is not contemplated.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.05	0.05	0.05	The PDA was adopted with strong Council support; the 2014 election included community discussion regarding managing/limiting growth. Council members have requested studies which may result in regulations for larger units (3+ bedrooms), more family friendly designs for new units, affordable housing, and larger shares of owner-occupied units. Recent review of Sherwin-Williams project resulted in a density decrease as the Council was generally receptive to neighbor concerns expressed. The Council also considered (but narrowly rejected via a vote of 3 in favor and 2 against with 4 votes needed to adopt a moratorium) a proposal in February 2015 to place a moratorium on all residential project approvals to study some of the issues noted above.	
		2	History of neighborhood opposition	0.10	0.10	0.10	Neighbors organized to decrease or oppose what is called the Sherwin-Williams project, planned for 540 units and 94,000 square feet of commercial. However, organized opposition on other projects was not present for several previous projects.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Alameda County is still in post-Recession recovery. The average number of housing permits issued in 2014 was about 55% of the peak reached in the County in 2006. Emeryville averaged about 125 units permitted per year between 1990 and 2014 and up to 175 units per year between 2000 and 2010. The last few years have consistently averaged about 200 units per year in permits; compared with a peak of 500 units in 2003. The PDA would need to average 200 units per year between 2015 and 2040 to achieve its unit-allocation.  Overall, investment in the City's real estate have been gaining strength post-Recession. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1990 and 2013 to reach the allocation.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	Between 1,000 and 1,100 units are in the pipeline, including projects in pre-application, processing, and approved but not under construction (Sherwin-Williams, Marketplace Shellmound, 1225 65th Street, Anton Nady, 3706 San Pablo Ave, and Baker Metal). About 206 units are under construction. Note that 435 units have been developed in the PDA since 2010.	

**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate prices similar to the Bay Area-average and faster price-growth than Bay Area-wide sales. Educational attainment of PDA residents indicate a more highly educated population compared with Bay Area-wide conditions (70% v. 43%), median household income below Bay Area average (\$68,000 compared to \$80,000), and much higher population growth rates than Bay Area-wide (about 84% compared to 8% Bay Area-wide).	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	The City's strong track record of multifamily development indicate that financial feasibility has not been a constraint in the past nor is anticipated in the near future. Site availability, site, and configuration will present some difficulty for developers in the future, though a review of potentially unused and underused sites indicates sufficient land to meet the housing allocation in the future. The constrained land availability and strong demand means that projects of a relatively high densities are expected in the City. Densities of roughly 80 units per acre would be needed to meet the City's allocation. Between 2006 and 2013, about one-quarter of units were built in this density range; however, more than 95 percent of the units within the 11 projects that are planned or approved by the City meet or exceed the 80 unit per acre density range.	
		5	Parcel size and configuration	0.00	0.00	0.05	The availability of sites and the efficiency of developing on those sites is likely to constrain development in the later term of the planning horizon.	
		6	Existence of major investment disincentives	0.10	0.05	0.00	Redevelopment in Emeryville is typically on sites with soil and groundwater contamination, though most projects have been able to appropriately remediate sites and develop vertically. Actual and perceptions of crime decrease interest from family households. Also, the City is seeking to rebrand the MacArthur BART station to more prominently link it to the Emery-go-round and Emeryville, which would help perceptions regarding transit access in the City.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.10	0.05	Infrastructure capacity for mobility, sanitary sewer, parks, community space, and broadband access improvements have all been identified as needed to meet demands by new residents. The top improvements in terms of cost include the South Bayfront Pedestrian-Bicycle Bridge, an Arts Center, and Utility Undergrounding.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	The current CIP estimates \$95 million in costs over the next 5 years with significant funding sources from the City's general capital budget, new development, Successor Agency to the RDA, and Alameda County's Measure B funding, among others. A roughly \$10 million funding gap has been identified. The City has a impact fees for traffic, parks, and affordable housing.	
		3	PDA financing capacity	0.00	0.00	0.00	New development will pay impact fees to assist in financing needed improvements.	

**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,461				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				5,470	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	991				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		6,461	6,461	6,461	
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.15	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.15	0.10	0.05	
			<i>Market and Investment Attractiveness</i>		0.35	0.15	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.15	0.05	
7	EPS estimate of housing production given constraints		1,615	3,877	5,492			
8	Percentage of PDA 2040 housing allocation accommodated		29.5%	70.9%	100.4%			
	Summary	<p>With nearly the whole City located in the PDA, a relatively high-pace of multifamily and other types of development, and a General Plan with zoning largely supportive of dense development types, the City of Emeryville is expected the meet much of its 2040 unit allocation. The main barriers to full achievement of the allocation include: (1) a burgeoning community opposition movement working to downsize or halt new multifamily development; (2) fewer "development" ready sites mean more development will need to take place on sites with existing revenues streams and irregularly shaped sites; and (3) financial feasibility challenges for structured and podium parking will mean that some projects will be developed at lower density levels and produce fewer units per acre than are needed to achieve the allocation.</p> <p><b>In the amended scenario, community opposition to projects is less successful than in the baseline projection and parcel assemble tools are available for the City or another entity.</b></p>						

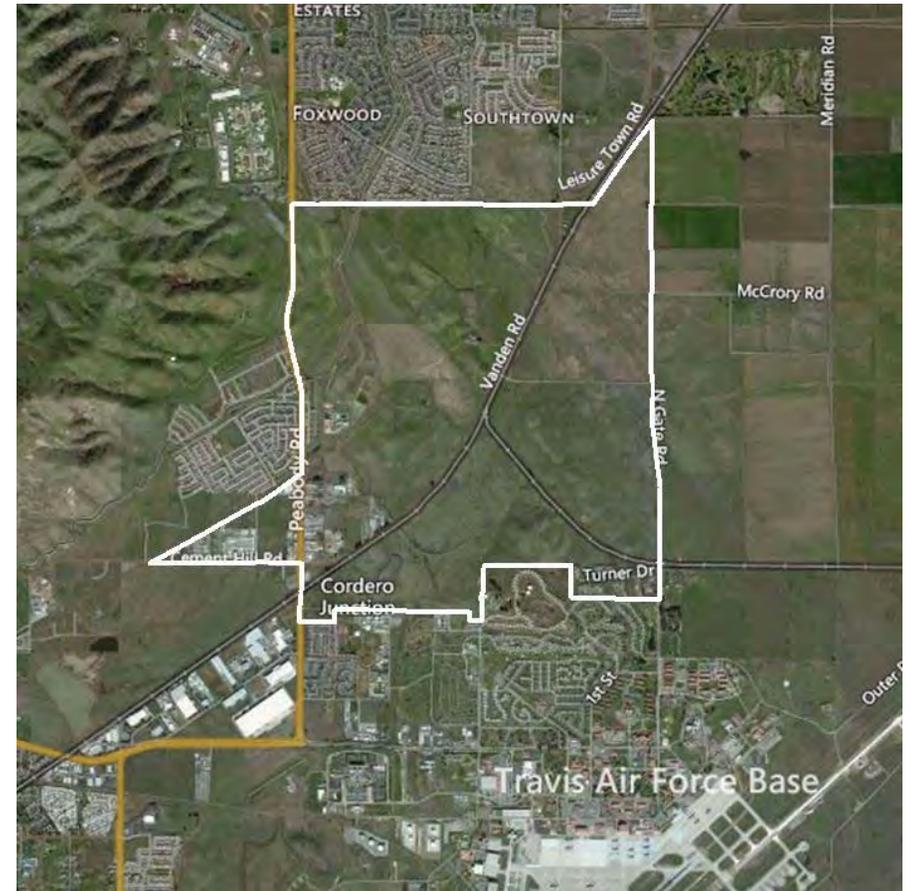
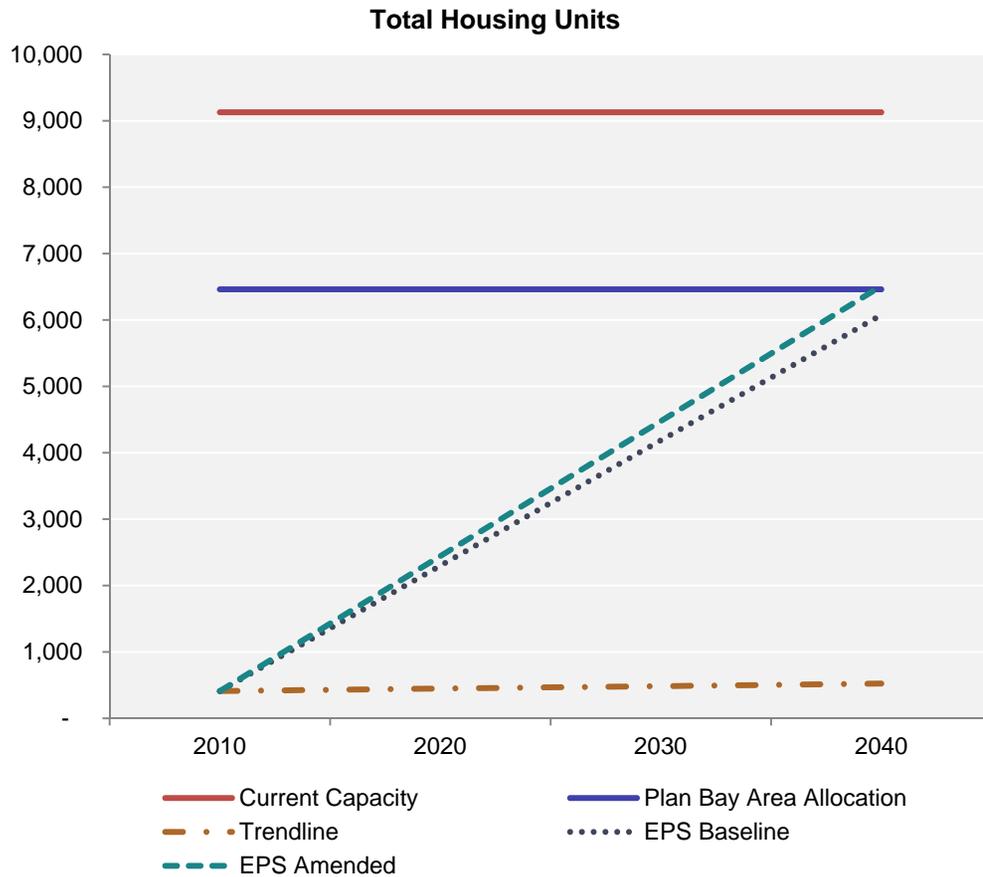
**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	PDA boundaries is nearly equal to the City's boundaries, so the City's General Plan is the relevant planning document.	
		1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No, displacement is not contemplated.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.05	0.05	0.05	The PDA was adopted with strong Council support; the 2014 election included community discussion regarding managing/limiting growth. Council members have requested studies which may result in regulations for larger units (3+ bedrooms), more family friendly designs for new units, affordable housing, and larger shares of owner-occupied units. Recent review of Sherwin-Williams project resulted in a density decrease as the Council was generally receptive to neighbor concerns expressed. The Council also considered (but narrowly rejected via a vote of 3 in favor and 2 against with 4 votes needed to adopt a moratorium) a proposal in February 2015 to place a moratorium on all residential project approvals to study some of the issues noted above.	
		2	History of neighborhood opposition	0.10	0.05	0.00	Neighbors organized to decrease or oppose what is called the Sherwin-Williams project, planned for 540 units and 94,000 square feet of commercial. Organized opposition on other projects was not present for several previous project.  <b>In the amended scenario, community opposition is less successful in the out-years of the planning period.</b>	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Alameda County is still in post-Recession recovery. The average number of housing permits issued in 2014 was about 55% of the peak reached in the County in 2006. Emeryville averaged about 125 units permitted per year between 1990 and 2014 and up to 175 units per year between 2000 and 2010. The last few years have consistently averaged about 200 units per year in permits; compared with a peak of 500 units in 2003. The PDA would need to average 200 units per year between 2015 and 2040 to achieve its unit-allocation.  Overall, investment in the City's real estate have been gaining strength post-Recession. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1990 and 2013 to reach the allocation.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	Between 1,000 and 1,100 units are in the pipeline, including projects in pre-application, processing, and approved but not under construction (Sherwin-Williams, Marketplace Shellmound, 1225 65th Street, Anton Nady, 3706 San Pablo Ave, and Baker Metal). About 206 units are under construction. Note that 435 units have been developed in the PDA since 2010.	

**Table A-11. Emeryville: Mixed-Use Core**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate prices similar to the Bay Area-average and faster price-growth than Bay Area-wide sales. Educational attainment of PDA residents indicate a more highly educated population compared with Bay Area-wide conditions (70% v. 43%), median household income below Bay Area average (\$68,000 compared to \$80,000), and much higher population growth rates than Bay Area-wide (about 84% compared to 8% Bay Area-wide).	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	The City's strong track record of multifamily development indicate that financial feasibility has not been a constraint in the past nor is anticipated in the near future. Site availability, site, and configuration will present some difficulty for developers in the future, though a review of potentially unused and underused sites indicates sufficient land to meet the housing allocation in the future. The constrained land availability and strong demand means that projects of a relatively high densities are expected in the City. Densities of roughly 80 units per acre would be needed to meet the City's allocation. Between 2006 and 2013, about one-quarter of units were built in this density range; however, more than 95 percent of the units within the 11 projects that are planned or approved by the City meet or exceed the 80 unit per acre density range.	
		5	Parcel size and configuration	0.00	0.00	0.00	The availability of sites and the efficiency of developing on those sites is likely to constrain development in the later term of the planning horizon.  <b>In the amended scenario, parcel assembly tools are available to assemble land for redevelopment.</b>	
		6	Existence of major investment disincentives	0.10	0.05	0.00	Redevelopment in Emeryville is typically on sites with soil and groundwater contamination, though most projects have been able to appropriately remediate sites and develop vertically. Actual and perceptions of crime decrease interest from family households. Also, the City is seeking to rebrand the MacArthur BART station to more prominently link it to the Emery-go-round and Emeryville, which would help perceptions regarding transit access in the City.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.10	0.05	Infrastructure capacity for mobility, sanitary sewer, parks, community space, and broadband access improvements have all been identified as needed to meet demands by new residents. The top improvements in terms of cost include the South Bayfront Pedestrian-Bicycle Bridge, an Arts Center, and Utility Undergrounding.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	The current CIP estimates \$95 million in costs over the next 5 years with significant funding sources from the City's general capital budget, new development, Successor Agency to the RDA, and Alameda County's Measure B funding, among others. A roughly \$10 million funding gap has been identified. The City has a impact fees for traffic, parks, and affordable housing.	
		3	PDA financing capacity	0.00	0.00	0.00	New development will pay impact fees to assist in financing needed improvements.	

# Fairfield: Fairfield-Vacaville Train Station



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
6,050	8,715	5,665	94%	Modest pricing and infrastructure needs	6,101	101%	Infrastructure resources available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	8,715				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				6,050	This number refers to the increment of new housing allocated to the PDA in <i>Plan Bay Area</i> .
		3	Capacity surplus or (shortfall)	2,665				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		8,715	8,715	8,715	
		6	Sum of Capacity Constraint Coefficients		0.85	0.60	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.65	0.45	0.25			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.15	0.10			
7	EPS estimate of housing production given constraints		1,307	3,486	5,665			
8	Percentage of PDA 2040 housing allocation accommodated		21.6%	57.6%	93.6%			
<b>Summary</b>			<p>The Fairfield Train Station Specific Plan (TSSP), planned around a forthcoming Capitol Corridor train station, was adopted by the City in 2011. Construction on key roads and other infrastructure is underway to help prepare the site for new development. The City has been working with several developers and landowners planning to invest in the TSSP. While land use zoning, CEQA review, and a new transit option are in place or underway, a key question for the PDA is the depth of the market for multifamily development in an untested area of Fairfield. The Baseline projection indicates that market constraints on multifamily development will be a main barrier to achieving the full 2040 allocation. In addition, the TSSP includes area-wide impact fees to fund improvements in the undeveloped area, which could pose a financial feasibility constraints for some product types.</p>					

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the Train Station Specific Plan and programmatic EIR have been adopted.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	There is very little development in the PDA therefore no residential neighborhoods are anticipated to be displaced.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of advancing the Train Station Plan through adoption of the new land use plan and financing plan.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No organized and effective opposition exists for this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	Investment in new housing in Solano County is still in post-Recession. The total number of units permitted in the County in 2014 was about 650, compared to the 2005 peak of 2,800 units. This is lower than the number of housing permits Bay Area-wide, which reached about 80% of the peak, in 2014.  The City as a whole averaged about 480 units permitted per year between 1990 and 2014. The PDA would need to average 200 units per year between 2010 and 2040 to achieve its unit-allocation.	

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
		2	Recent Local Development Activity (pipeline)		0.20	0.10	0.00	The City is currently working with developers in the TSSP and estimate that about 500 units are being contemplated as an initial phase of development.
		3	General Market Conditions		0.10	0.10	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$67,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.15 per sq.ft. per month for apartments and \$200 per square foot for condos. These apartment and condo prices are relatively low. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to gradually lessen in subsequent years.
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	No parcel size constraints.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives.

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	Existing infrastructure capacity is not sufficient to achieve higher densities in this PDA. Much of the land is underdeveloped.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Yes, CIP and financing plan in place. The TSSP and accompanying impact fee program itemize all needed improvements for development in the PDA, which total about \$370 million. About \$314 million is expected to be covered from impact fees and developer equity.
		3	PDA financing capacity		0.15	0.10	0.05	Outside sources will be needed to fund the gap between developer sources and total costs.

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	8,715				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				6,050	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	2,665					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		8,715	8,715	8,715		
		6	Sum of Capacity Constraint Coefficients		0.80	0.55	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.65	0.45	0.25				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.05				
7	EPS estimate of housing production given constraints		1,743	3,922	6,101				
8	Percentage of PDA 2040 housing allocation accommodated		28.8%	64.8%	100.8%				
	Summary		<p>The Fairfield Train Station Specific Plan (TSSP), planned around a forthcoming Capitol Corridor train station, was adopted by the City in 2011. Construction on key roads and other infrastructure is underway to help prepare the site for new development. The City has been working with several developers and landowners planning to invest in the TSSP. While land use zoning, CEQA review, and a new transit option are in place or underway, a key question for the PDA is the depth of the market for multifamily development in an untested area of Fairfield. The Baseline projection indicates that market constraints on multifamily development will be a main barrier to achieving the full 2040 allocation. In addition, the TSSP includes area-wide impact fees to fund improvements in the undeveloped area, which could pose a financial feasibility constraints for some product types.</p> <p>In the amended scenario, outside funding is available for some of the major infrastructure upgrades needed to prepare the TSSP area for development.</p>						

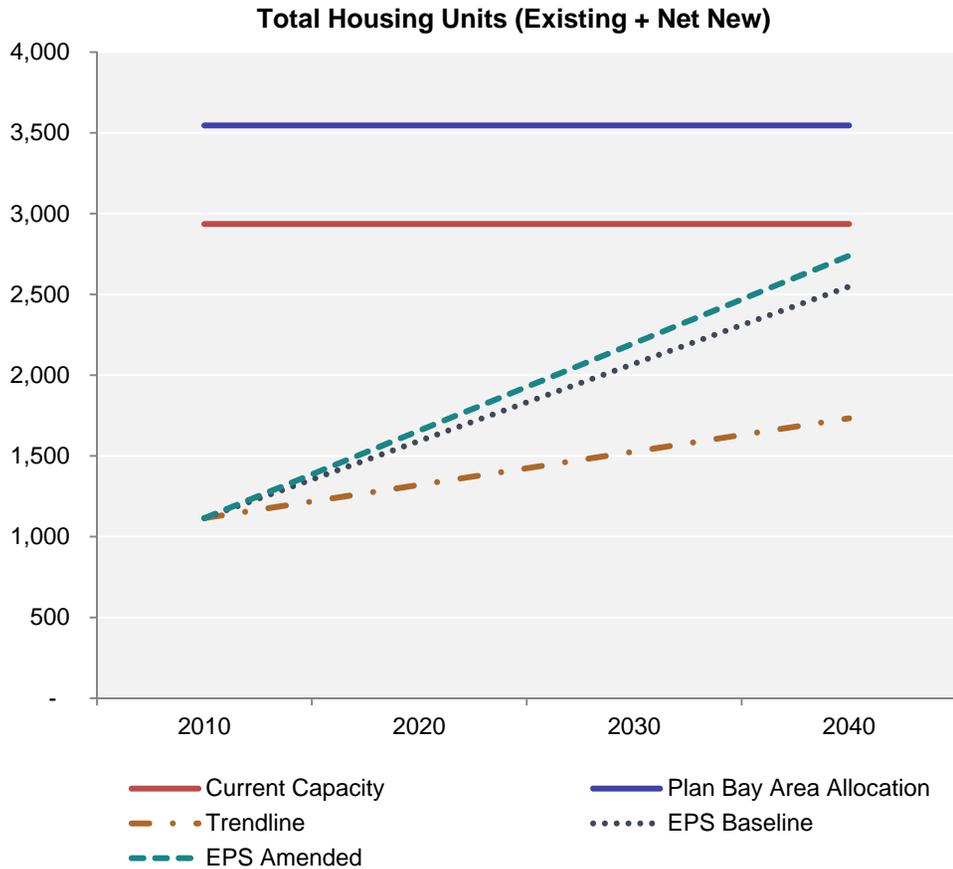
**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the Train Station Specific Plan and programmatic EIR have been adopted.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	There is very little development in the PDA therefore no residential neighborhoods are anticipated to be displaced.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of advancing the Train Station Plan through adoption of the new land use plan and financing plan.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No organized and effective opposition exists for this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	Investment in new housing in Solano County is still in post-Recession. The total number of units permitted in the County in 2014 was about 650, compared to the 2005 peak of 2,800 units. This is lower than the number of housing permits Bay Area-wide, which reached about 80% of the peak, in 2014.  The City as a whole averaged about 480 units permitted per year between 1990 and 2014. The PDA would need to average 200 units per year between 2010 and 2040 to achieve its unit-allocation.	
		2	Recent Local Development Activity (pipeline)	0.20	0.10	0.00	The City is currently working with developers in the TSSP and estimate that about 500 units are being contemplated as an initial phase of development.	
		3	General Market Conditions	0.10	0.10	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$67,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.15 per sq.ft. per month for apartments and \$200 per square foot for condos. These apartment and condo prices are relatively low. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to gradually lessen in subsequent years.	

**Table A-12. Fairfield: Fairfield-Vacaville Train Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	No parcel size constraints.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.05	0.05	Existing infrastructure capacity is not sufficient to achieve higher densities in this PDA. Much of the land is underdeveloped.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Yes, CIP and financing plan in place. The TSSP and accompanying impact fee program itemize all needed improvements for development in the PDA, which total about \$370 million. About \$314 million is expected to be covered from impact fees and developer equity.	
		3	PDA financing capacity	0.10	0.05	0.00	External sources will be needed to fund the gap between developer sources and total costs.  <b>In the amended scenario, outside funding is assumed to be available to augment the financing capacity of the PDA.</b>	

# Fairfield: West Texas Street Gateway



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,430	1,820	1,433	59%	Modest pricing and costs to relocate public uses in PDA	1,624	67%	Specific Plan complete and infrastructure resources available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,820				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				2,430	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(610)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	5%	5%	
		5	Estimated gross housing capacity at each period		1,820	1,911	1,911	
		6	Sum of Capacity Constraint Coefficients		0.85	0.50	0.25	
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.70	0.45	0.20			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.05			
7	EPS estimate of housing production given constraints		273	956	1,433			
8	Percentage of PDA 2040 housing allocation accommodated		11.2%	39.3%	59.0%			
		Summary	The City of Fairfield is currently preparing a specific plan and EIR for the West Texas Street area, called the Heart of Fairfield Specific Plan. The planning effort is expected to increase the amount of land which would allow multifamily development. The key factors limiting achievement of the allocation to this PDA are market factors which limit the depth of the market for multifamily development and the scale of developable land in the PDA, which constrain new development to a limited number of parcels.					

**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.10	0.00	0.00	Not in place, but a specific plan and EIR are now underway which will include the West Texas Street Gateway PDA and the Fairfield Downtown South PDA.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Displacement is not expected.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Regional mandates and directives have been viewed negatively by some community and public officials; however, this view has not translated into lack of support for investment in the PDAs.
		2	History of neighborhood opposition		0.00	0.00	0.00	No organized and successful opposition is present in the PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.15	0.10	0.05	Investment in new housing in Solano County is still in post-Recession. The total number of units permitted in the County in 2014 was about 650, compared to the 2005 peak of 2,800 units. This is lower than the number of housing permits Bay Area-wide, which reached about 80% of the peak, in 2014.  The City as a whole averaged about 480 units permitted per year between 1990 and 2014. The PDA would need to average 80 units per year between 2010 and 2040 to achieve its unit-allocation.
		2	Recent Local Development Activity (pipeline)		0.20	0.10	0.00	There are not any major projects in the pipeline.

**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
		3	General Market Conditions		0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 12% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$37,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.40 per sq.ft. per month for apartments and \$180 per square foot for condos. These apartment prices are not sufficient to justify multifamily development. Though financial feasibility is a constraint now, market conditions in the area are improving as planning for the area moves forward and this constraint is expected to lessen gradually in subsequent years.
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.15	0.10	0.05	Existing commercial use on many parcels, divided property ownership and lack of willing sellers will constrain redevelopment in the PDA.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives are known relevant to this PDA.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	The Specific Plan process will indicate the condition of the existing infrastructure.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City staff expect that the now-underway Specific Plan will identify needed improvements (which are likely to be limited) and funding sources including development impact fees. The City currently has impact fees in place for public facilities, transportation, parks and recreation, and urban design.
		3	PDA financing capacity		0.05	0.05	0.05	Implementation of the Specific Plan's vision thus far would benefit from the relocation of major public uses - include two corp yards - from the PDA to less developable locations. Funding for these relocations however will be difficult to assemble solely from development in the PDA.

**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,820				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,430	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(610)					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	5%	5%		
		5	Estimated gross housing capacity at each period		1,820	1,911	1,911		
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.15		
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.65	0.40	0.15				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00				
		7	EPS estimate of housing production given constraints		455	1,147	1,624		
		8	Percentage of PDA 2040 housing allocation accommodated		18.7%	47.2%	66.8%		
			Summary	<p>The City of Fairfield is currently preparing a specific plan and EIR for the West Texas Street area, called the Heart of Fairfield Specific Plan. The planning effort is expected to increase the amount of land which would allow multifamily development. The key factors limiting achievement of the allocation to this PDA are market factors which limit the depth of the market for multifamily development and the scale of developable land in the PDA, which constrain new development to a limited number of parcels.</p> <p>In the amended scenario, outside funding is available to relocate public uses - including two corp yards - in the PDA to other, less developable locations which would free up acreage for redevelopment. Also, parcel assembly tools would also be available to assemble parcels with existing, underutilized uses to make them available for denser development.</p>					

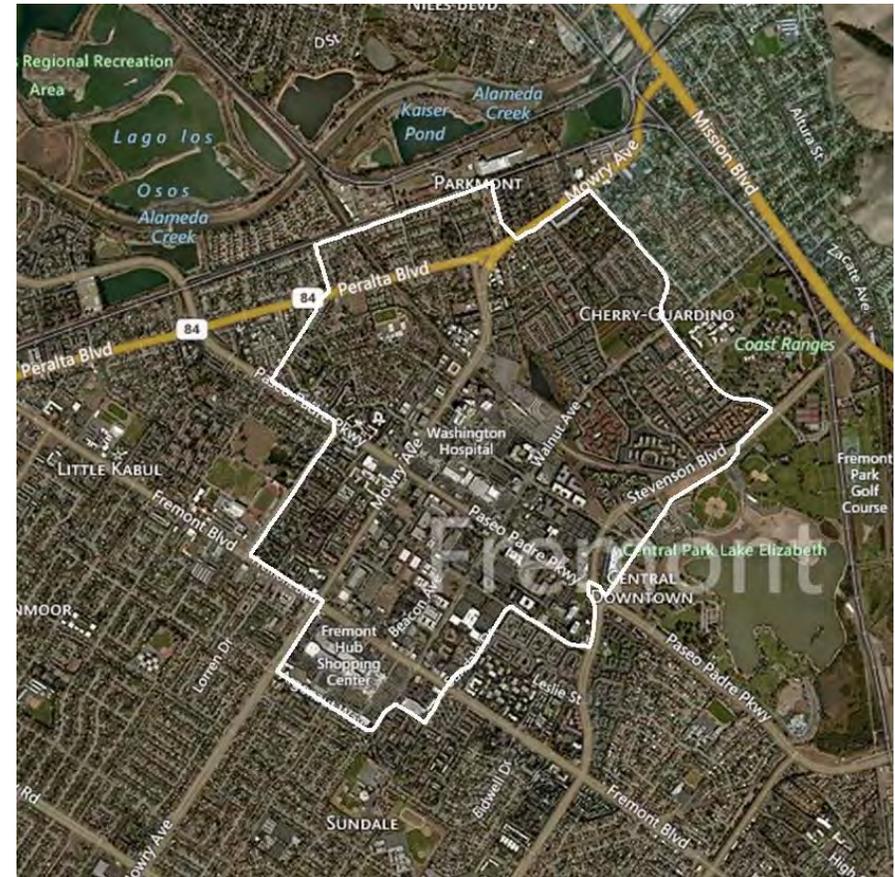
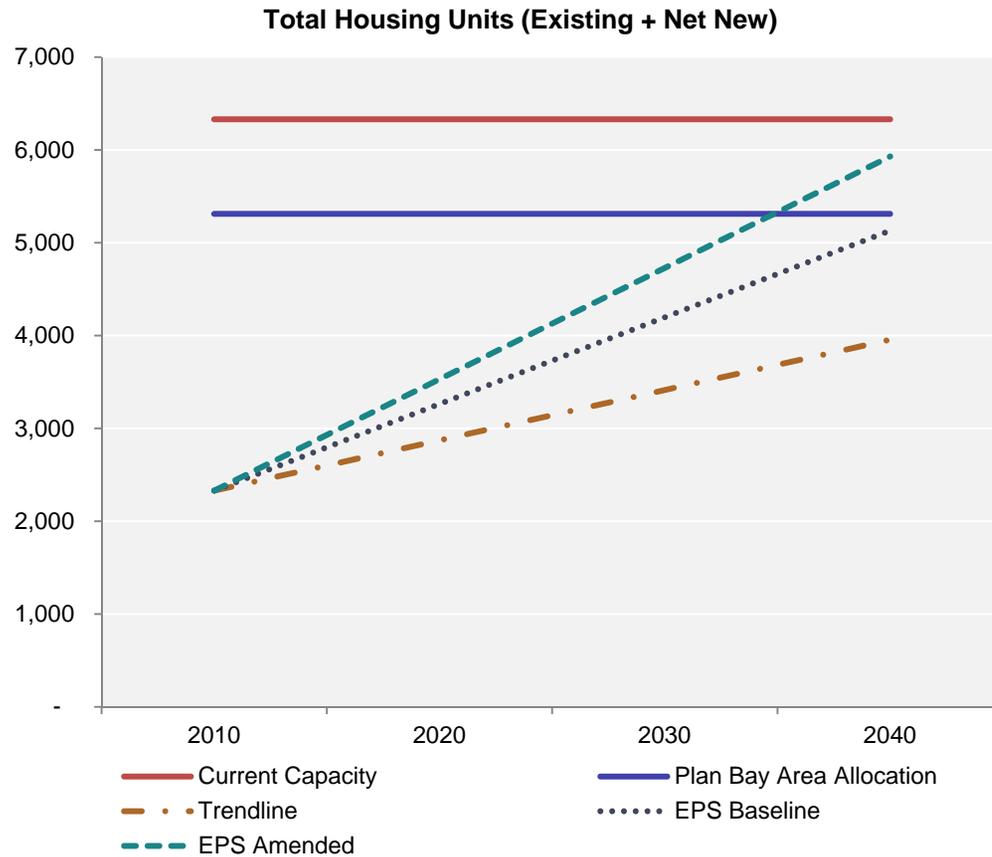
**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.10	0.00	0.00	Not in place, but a specific plan and EIR are now underway which will include the West Texas Street Gateway PDA and the Fairfield Downtown South PDA.
		2	Time required and difficulty in obtaining entitlement: institutional capacity and jurisdictional track record		0.00	0.00	0.00	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Regional mandates and directives have been viewed negatively by some community and public officials; however, this view has not translated into lack of support for investment in the PDAs.
		2	History of neighborhood opposition		0.00	0.00	0.00	No organized and successful opposition is present in the PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.15	0.10	0.05	Investment in new housing in Solano County is still in post-Recession. The total number of units permitted in the County in 2014 was about 650, compared to the 2005 peak of 2,800 units. This is lower than the number of housing permits Bay Area-wide, which reached about 80% of the peak, in 2014.  The City as a whole averaged about 480 units permitted per year between 1990 and 2014. The PDA would need to average 80 units per year between 2010 and 2040 to achieve its unit-allocation.
		2	Recent Local Development Activity (pipeline)		0.20	0.10	0.00	There are not any major projects in the pipeline.
		3	General Market Conditions		0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 12% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$37,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$1.40 per sq.ft. per month for apartments and \$180 per square foot for condos. These apartment prices are not sufficient to justify multifamily development. Though financial feasibility is a constraint now, market conditions in the area are improving as planning for the area moves forward and this constraint is expected to lessen gradually in subsequent years.

**Table A-13. Fairfield: West Texas Street Gateway**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.10	0.05	0.00	Existing commercial use on many parcels, divided property ownership and lack of willing sellers will constrain redevelopment in the PDA.  <i>Assume that parcel assembly tools limit this constraint on development.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives are known relevant to this PDA.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	The Specific Plan process will indicate the condition of the existing infrastructure.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City staff expect that the now-underway Specific Plan will identify needed improvements (which are likely to be limited) and funding sources including development impact fees. The City currently has impact fees in place for public facilities, transportation, parks and recreation, and urban design.
		3	PDA financing capacity		0.00	0.00	0.00	Implementation of the Specific Plan's vision thus far would benefit from the relocation of major public uses - include two corp yards - from the PDA to less developable locations. Funding for these relocations however will be difficult to assemble solely from development in the PDA.  <i>In the amended scenario, outside funding is assumed to be available to relocate some of these public uses, freeing up land for development in the PDA.</i>

# Fremont: City Center



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,900	9,842	3,937	136%	Infrastructure needs and school capacity	5,905	204%	External infrastructure funding or EIFD

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-14. Fremont: City Center**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	9,842				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,900	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	6,942					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		Capacity is already well-above housing allocations.
		5	Estimated gross housing capacity at each period		9,842	9,842	9,842		
		6	Sum of Capacity Constraint Coefficients		0.90	0.75	0.60		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.05	0.05	0.00		
			<i>Market and Investment Attractiveness</i>		0.55	0.50	0.45		
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.20	0.15				
7	EPS estimate of housing production given constraints		984	2,461	3,937				
8	Percentage of PDA 2040 housing allocation accommodated		33.9%	84.8%	135.8%				
	<b>Summary</b>		Downtown area now planned for substantial expansion of residential development, well above the PDA housing allocation. Constraints include need for substantial infrastructure investments, compatibility of the variety of land uses and related conflicts (parking, etc.) and also concern on the part of existing residents regarding the impacts of the new residential development on Fremont's already overcrowded K-12 schools. City is in process of developing financing sources to tap development-based financing capacity and external sources.						

**Table A-14. Fremont: City Center**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Downtown Plan adopted earlier this year (2015)	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Yes, Council, as evidenced by recent development approvals and adoption of the Downtown Plan support development in the PDA	
		2	History of neighborhood opposition	0.05	0.05	0.00	Emerging concerns about new residential development are largely related to local school capacity.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.30	0.20	As a currently a largely commercial area, the PDA has had little residential development activity in recent years. The City overall has seen an increase in development in the post-Recession period reflecting strong sub-regional housing demand and complementary planning efforts creating new residential development capacity in the Downtown area and elsewhere.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 200 residential units in several projects have approved and are pending construction. A number of large projects have been proposed and substantial interest in vacant sites is evident.	
		3	General Market Conditions	0.05	0.05	0.05	General market conditions for residential development in Fremont are presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.	
		4	Financial Feasibility Constraint	0.05	0.10	0.10	Site-related and impact mitigation costs may create feasibility challenges for multifamily and mixed use development throughout the forecast period	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	

**Table A-14. Fremont: City Center**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.10	Big issue is schools capacity. Transportation linkages and improvements also comprise major costs, including local roadway and intersection improvements consistent with the vision of the Downtown Plan and also arterial connections to the freeway network. Parking is also a constraint and investment in public parking will be needed to support mix of commercial, institutional, and residential development envisioned.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.00	0.00	Downtown Plan includes reference to a variety of funding mechanisms that the City is in process of implementing.
		3	PDA financing capacity		0.10	0.10	0.05	Substantial financing capacity will be created by the new development that is envisioned, providing impact fee revenues, potential for tax increment financing (EIFD), and garnering funding from external sources including Measure BB.

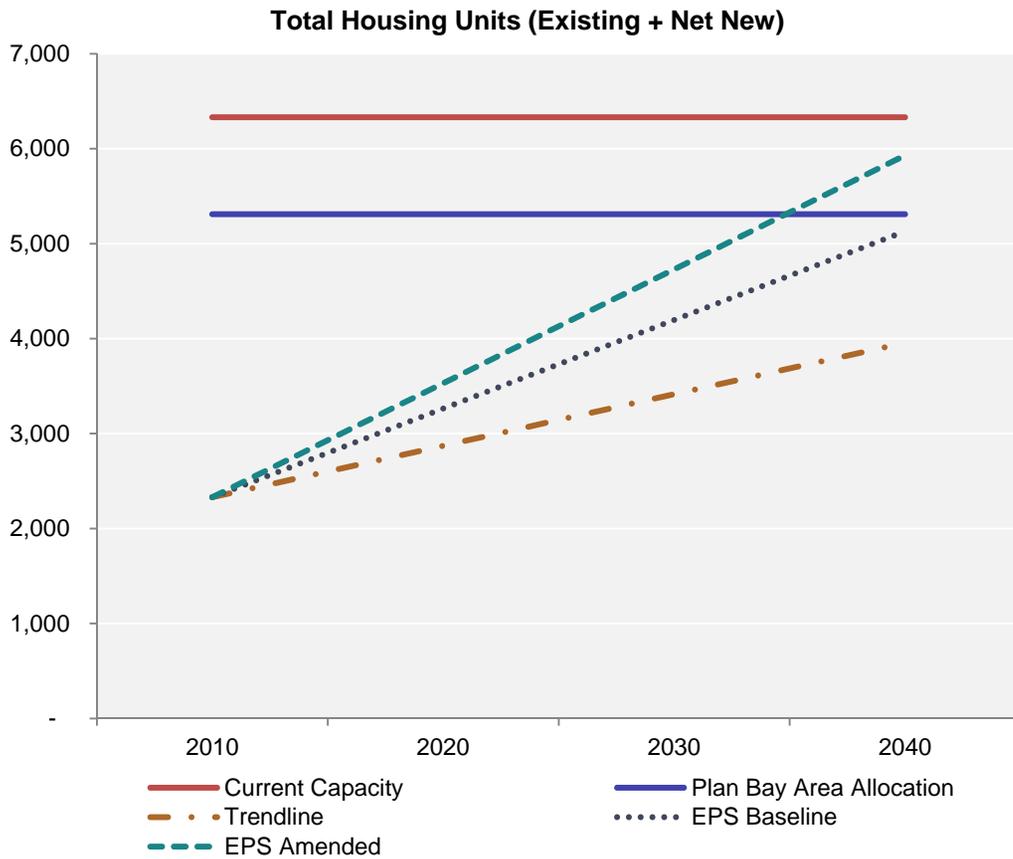
**Table A-14. Fremont: City Center**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	9,842				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	Plan Bay Area new housing allocation				2,900	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	6,942					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		Capacity is already well-above housing allocations.
		5	Estimated gross housing capacity at each period		9,842	9,842	9,842		
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.40		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.05	0.05	0.00		
	<i>Market and Investment</i>		0.55	0.45	0.35				
	<i>Attractiveness</i>								
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.20	0.05				
7	EPS estimate of housing production given constraints			984	2,953	5,905			
8	Percentage of PDA 2040 housing allocation accommodated			33.9%	101.8%	203.6%			
			Summary	Downtown area now planned for substantial expansion of residential development, well above the PDA housing allocation. Constraints include need for substantial infrastructure investments, compatibility of the variety of land uses and related conflicts (parking, etc.) and also concern on the part of existing residents regarding the impacts of the new residential development on Fremont's already overcrowded K-12 schools. City is in process of developing financing sources to tap development-based financing capacity and external sources.					
				Investments in school capacity, parking, and transportation capacity improve attractiveness and feasibility of development.					

**Table A-14. Fremont: City Center**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Downtown Plan adopted earlier this year (2015)	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Yes, Council, as evidenced by recent development approvals and adoption of the Downtown Plan support development in the PDA	
		2	History of neighborhood opposition	0.05	0.05	0.00	Emerging concerns about new residential development are largely related to local school capacity.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.30	0.20	As a currently a largely commercial area, the PDA has had little residential development activity in recent years. The City overall has seen an increase in development in the post-Recession period reflecting strong sub-regional housing demand and complementary planning efforts creating new residential development capacity in the Downtown area and elsewhere.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 200 residential units in several projects have approved and are pending construction. A number of large projects have been proposed and substantial interest in vacant sites is evident.	
		3	General Market Conditions	0.05	0.05	0.05	General market conditions for residential development in Fremont are presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.	
		4	Financial Feasibility Constraint	0.05	0.10	0.10	Site-related and impact mitigation costs may create feasibility challenges for multifamily and mixed use development throughout the forecast period	
		5	Parcel size and configuration	0.00	0.00	0.00	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.05	Big issue is schools capacity. Transportation linkages and improvements also comprise major costs, including local roadway and intersection improvements consistent with the vision of the Downtown Plan and also arterial connections to the freeway network. Parking is also a constraint and investment in public parking will be needed to support mix of commercial, institutional, and residential development envisioned.  <b>Investments in school capacity, parking, and transportation capacity improve attractiveness and feasibility of development.</b>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.00	0.00	Downtown Plan includes reference to a variety of funding mechanisms that the City is in process of implementing.	
		3	PDA financing capacity	0.10	0.10	0.00	Substantial financing capacity will be created by the new development that is envisioned, providing impact fee revenues, potential for tax increment financing (EIFD), and garnering funding from external sources including Measure BB.	

# Fremont: Warm Springs



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,980	4,000	2,800	94%	Infrastructure needs and school capacity	3,600	121%	Improve infrastructure financing strategy

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-15. Fremont: Warm Springs**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	4,000				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	Plan Bay Area new housing allocation				2,980	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	1,020					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		4,000	4,000	4,000		
		6	Sum of Capacity Constraint Coefficients		0.70	0.50	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.40	0.30	0.10				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.20	0.20				
7	EPS estimate of housing production given constraints			1,200	2,000	2,800			
8	Percentage of PDA 2040 housing allocation accommodated			40.3%	67.1%	94.0%			
		Summary	The Warm Springs PDA has been the focus of substantial recent development activity creating capacity and commitments to build residential units in excess of the PDA housing allocation. As part of the development approval process developers have agreed to an innovative plan to build a new elementary school and expand capacity of middle and high schools.						

**Table A-15. Fremont: Warm Springs**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Community Plan approved along with master plans for individual developments (Lennar, Toll Brothers). EIR completed as part of the process.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by projects recently approved and the adoption of plans for the PDA
		2	History of neighborhood opposition		0.00	0.00	0.00	Concerns about school capacity has dominated the public debate developers have responded by providing additional (in addition to SB-50 fees) funding for schools
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.20	0.00	As a currently developed industrial area the PDA has had little development activity in recent years. The City overall has seen an increase in development in the post-Recession period reflecting strong sub-regional housing demand and complementary planning efforts creating new residential development capacity.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Approximately 4,000 units are approved or in the approval pipeline.
		3	General Market Conditions		0.00	0.00	0.00	General market conditions for residential development in Fremont are presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Site-related and impact mitigation costs may create feasibility challenges for multifamily and mixed use development throughout the forecast period
		5	Parcel size and configuration		0.00	0.00	0.00	Development proposals have taken advantage of large commercial properties that have been converted to residential uses
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.10	Existing infrastructure requires substantial improvement as part of the development
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.00	0.00	Financing Plan created as part of the Community Plan
		3	PDA financing capacity		0.10	0.10	0.10	Substantial financing capacity and agreement created as part of the development approval process. Shortfalls remain for certain area-wide or regional infrastructure including the proposed pedestrian bridge to improve access to the BART station.

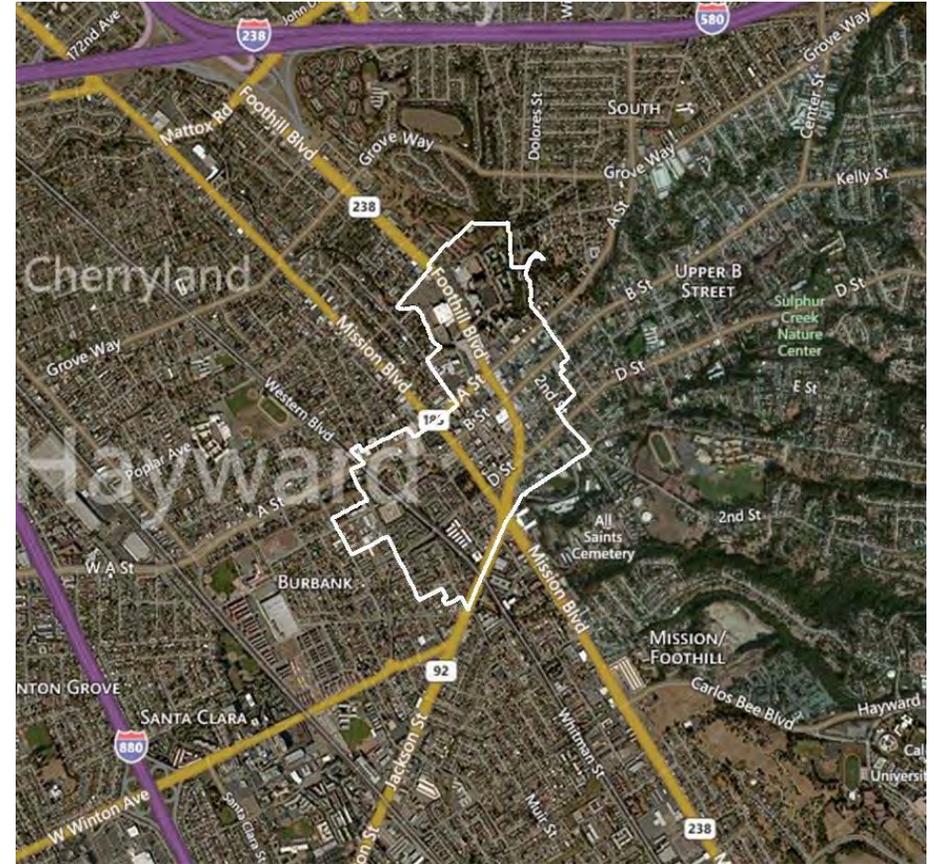
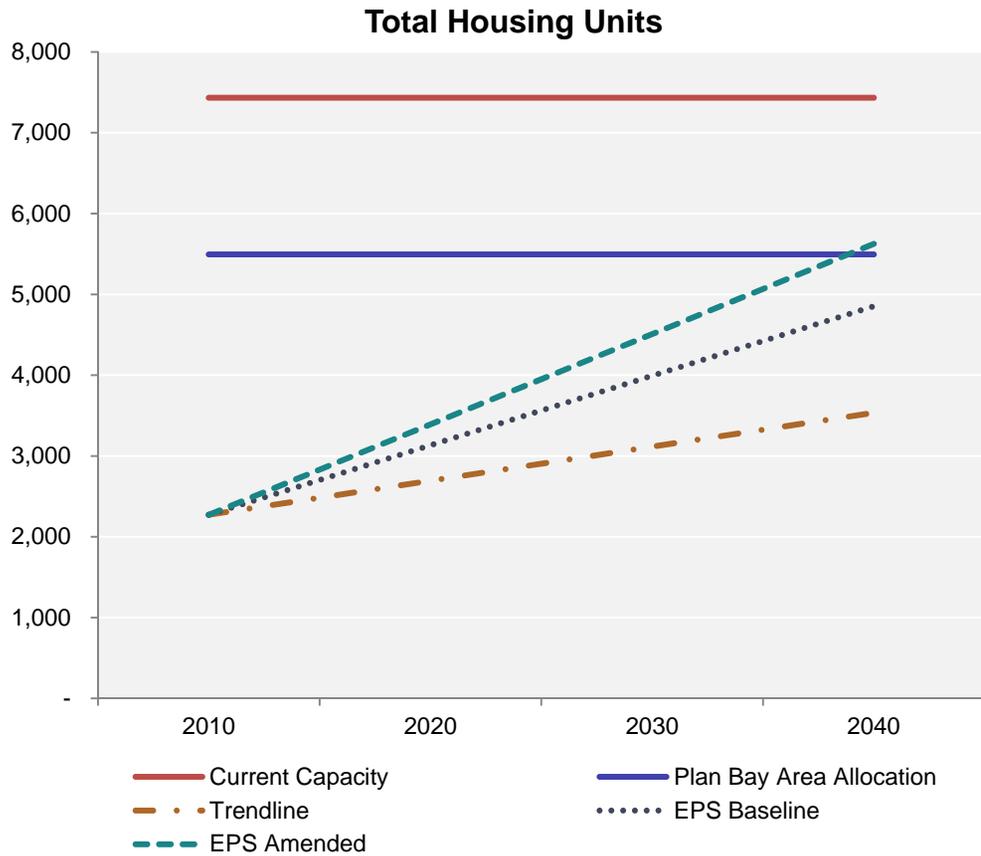
**Table A-15. Fremont: Warm Springs**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,000				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,980	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	1,020					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		4,000	4,000	4,000		
		6	Sum of Capacity Constraint Coefficients		0.70	0.40	0.10		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment</i>		0.40	0.30	0.10				
	<i>Attractiveness</i>								
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.10	0.00				
7	EPS estimate of housing production given constraints		1,200	2,400	3,600				
8	Percentage of PDA 2040 housing allocation accommodated		40.3%	80.5%	120.8%				
	Summary	<p>The Warm Springs PDA has been the focus of substantial recent development activity creating capacity and commitments to build residential units in excess of the PDA housing allocation. As part of the development approval process developers have agreed to an innovative plan to build a new elementary school and expand capacity of middle and high schools.</p> <p><b>Improved financing strategy addresses infrastructure capacity issues. Financing strategy and related implementing measures created.</b></p>							

**Table A-15. Fremont: Warm Springs**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Community Plan approved along with master plans for individual developments (Lennar, Toll Brothers). EIR completed as part of the process.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by projects recently approved and the adoption of plans for the PDA
		2	History of neighborhood opposition		0.00	0.00	0.00	Concerns about school capacity has dominated the public debate developers have responded by providing additional (in addition to SB-50 fees) funding for schools
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.20	0.00	As a currently developed industrial area the PDA has had little development activity in recent years. The City overall has seen an increase in development in the post-Recession period reflecting strong sub-regional housing demand and complementary planning efforts creating new residential development capacity.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Approximately 4,000 units are approved or in the approval pipeline.
		3	General Market Conditions		0.00	0.00	0.00	General market conditions for residential development in Fremont are presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Site-related and impact mitigation costs may create feasibility challenges for multifamily and mixed use development throughout the forecast period
		5	Parcel size and configuration		0.00	0.00	0.00	Development proposals have taken advantage of large commercial properties that have been converted to residential uses
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.05	0.00	Existing infrastructure requires substantial improvement as part of the development .  <b>Improved financing strategy addresses infrastructure capacity issues.</b>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.00	0.00	Financing Plan created as part of the Community Plan.  <b>Financing strategy and related implementing measures created.</b>
		3	PDA financing capacity		0.10	0.05	0.00	Substantial financing capacity and agreement created as part of the development approval process. Shortfalls remain for certain area-wide or regional infrastructure including the proposed pedestrian bridge to improve access to the BART station.

# Hayward: Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,220	5,159	2,580	80%	Modest pricing and infill parcelization	3,353	104%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-16. Hayward: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,159				Downtown Hayward Design Plan and Core Area Plan were adopted in 1992, and Route 238 Corridor Improvement Project plan is ongoing. Zoning and General Plan are up to date, reflect higher density mixed-use development opportunities in Downtown. CD+A identified 69 acres of opportunity sites, which can accommodate nearly 7,000 housing units at maximum zoning allowances (up to 100 DU/acre). Most Downtown area zoned for 45-65 DU-acre. Figure shown reflects average density of 75 du/ac.
		2	<i>Plan Bay Area</i> new housing allocation				3,220	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,939				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning already allows 30-108 DU/acre, more than ample for PBA allocation and at the top end, is more than is supported by market/feasibility. Specific Plan underway, but not expected to significantly increase housing capacity.
		5	Estimated gross housing capacity at each period		5,159	5,159	5,159	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	Current zoning is supportive, and new Specific Plan/EIR likely to continue supporting housing intensification.
			<i>Community Support</i>		0.00	0.00	0.00	Generally supportive of housing intensification, with some project-specific resistance as in most communities.
			<i>Market and Investment Attractiveness</i>		0.80	0.60	0.40	Modest achievable housing prices and costs to redevelop existing uses are the primary constraint.
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.10	0.10	City is making major investments, and minor project-specific investments and fees are not atypical, but modest unit values affect financing.
		7	EPS estimate of housing production given constraints		516	1,548	2,580	
		8	Percentage of PDA 2040 housing allocation accommodated		16.0%	48.1%	80.1%	
			<b>Summary</b>	Modest housing prices and demand and costs to redevelop existing uses are the primary constraint, as zoning, community support, and infrastructure are largely in place. Still, given the large capacity for housing and relatively modest allocation, EPS anticipates that this PDA should be able to accommodate most of its allocation by 2040.				

**Table A-16. Hayward: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	City has recently begun a new Specific Plan process for Downtown, to include a program EIR. Presently, zoning and other regulations are based on older documents back to 1992, but these too are supportive of intensification.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Opportunity sites are mostly older commercial developed at well below maximum allowable densities. No residential disruption.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Generally supportive of intensification. Council rejected a proposal for townhomes on a key site (Mervyn's), but is now considering a more dense housing and retail project for the same site.
		2	History of neighborhood opposition		0.00	0.00	0.00	Staff says Mission Boulevard projects for higher density development and form-based code have been supported by the community. Through Cal Poly study, community was supportive of "complete neighborhood" including housing, retail, parks, etc. Experience on former Mervyn's site proposal indicates some community resistance to intensification, but not out of the ordinary.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.40</b>	<b>0.25</b>	<b>0.05</b>	PDA added 988 housing units between 2000-2010. Greater 2-mile radius added 1,671. Pace of development required to reach PDA goals for 2040 is roughly consistent with past trends.
		2	Recent Local Development Activity (pipeline)		<b>0.05</b>	0.00	0.00	Nearly 600 units currently in the pipeline, including 104 approved and 486 pending approval.
		3	General Market Conditions		<b>0.10</b>	<b>0.05</b>	0.00	Downtown PDA and surrounding 2-mile area have relatively low incomes (\$57K median), ranking 14th out of 20 PDAs in sample. Significant retail vacancy in Downtown. Continued growth of Downtown housing may address both of these concerns over time.
		4	Financial Feasibility Constraint		<b>0.20</b>	<b>0.20</b>	<b>0.20</b>	Moderate achievable price points make it difficult to redevelop existing uses with cash flows, as found on most of the potential opportunity sites. But City thinks there are enough severely underutilized sites to keep development momentum. Also, ample number of opportunity sites means allocated growth can be achieved at ~47 DU/acre, which can be lower cost to construct than higher-density prototypes. Still, EPS considers it likely that some development will occur at lower densities due to feasibility constraint caused by modest prices.

**Table A-16. Hayward: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	<b>0.05</b>	<b>0.10</b>	Many sites are small and would be most viable for redevelopment if assembled. This issue likely will grow more severe as most developable sites are used first.	
		6	Existence of major investment disincentives	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Mixed-use requirements in some corridors add to feasibility burden; perception of school district quality and some safety concerns; "Loop" traffic circulation has affected pedestrian environment; and better connectivity to transit would be desirable.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Water Treatment Facility is being expanded, and City plans for new reservoirs to accommodate 2040 growth. Residential projects will likely have to make some project-specific upgrades due to age of infrastructure. Key needs are comparatively minor, and include streetscape and ped/bike facilities.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Some major capital improvements have been funded through General Fund/CIP or regional bond/grant programs. City has a Supplemental Building Construction Tax that usually goes to traffic projects, also has fees for parks, sewer, water, schools, and affordable housing. Frontage improvements required on case-by-case basis. CFD and other financing mechanisms will be explored in Specific Plan process.	
		3	PDA financing capacity	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Loss of Redevelopment has been significant in Downtown Hayward. Moderate values of new housing and limited commercial market represent constraints on ability to generate much more funding.	

**Table A-16. Hayward: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,159				Downtown Hayward Design Plan and Core Area Plan were adopted in 1992, and Route 238 Corridor Improvement Project plan is ongoing. Zoning and General Plan are up to date, reflect higher density mixed-use development opportunities in Downtown. CD+A identified 69 acres of opportunity sites, which can accommodate nearly 7,000 housing units at maximum zoning allowances (up to 100 DU/acre). Most Downtown area zoned for 45-65 DU-acre. Figure shown reflects average density of 75 du/ac.
		2	<i>Plan Bay Area</i> new housing allocation				3,220	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning already allows 30-108 DU/acre, more than ample for PBA allocation and at the top end, is more than is supported by market/feasibility. Specific Plan underway, but not expected to significantly increase housing capacity.
		5	Estimated gross housing capacity at each period		5,159	5,159	5,159	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	Current zoning is supportive, and new Specific Plan/EIR likely to continue supporting housing intensification.
			<i>Community Support</i>		0.00	0.00	0.00	Generally supportive of housing intensification, with some project-specific resistance as in most communities.
			<i>Market and Investment Attractiveness</i>		0.80	0.60	0.30	Modest achievable housing prices and costs to redevelop existing uses are the primary constraint.
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.10	0.05	City is making major investments, and minor project-specific investments and fees are not atypical, but modest unit values affect financing.
		7	EPS estimate of housing production given constraints		516	1,548	3,353	
		8	Percentage of PDA 2040 housing allocation accommodated		16.0%	48.1%	104.1%	
			<b>Summary</b>	Modest housing prices and demand and costs to redevelop existing uses are the primary constraint, as zoning, community support, and infrastructure are largely in place.				
				Amended assumes restoration of tools for parcels assembly, and securing of external funding for some required infrastructure to enhance feasibility and capacity.				

**Table A-16. Hayward: Downtown**

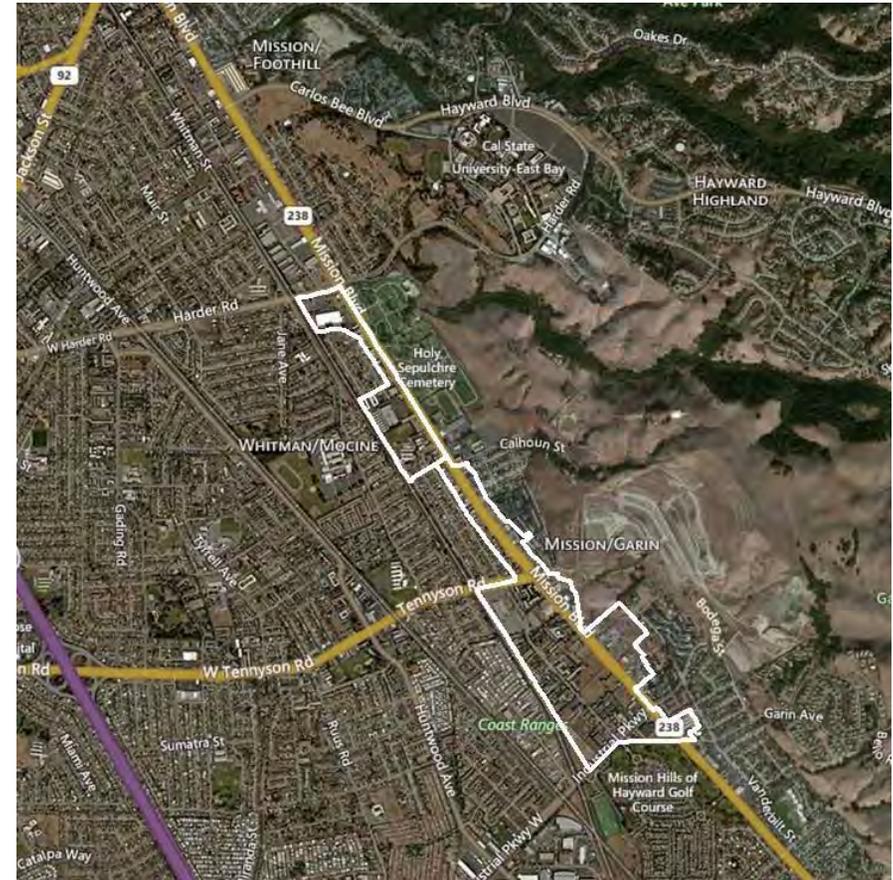
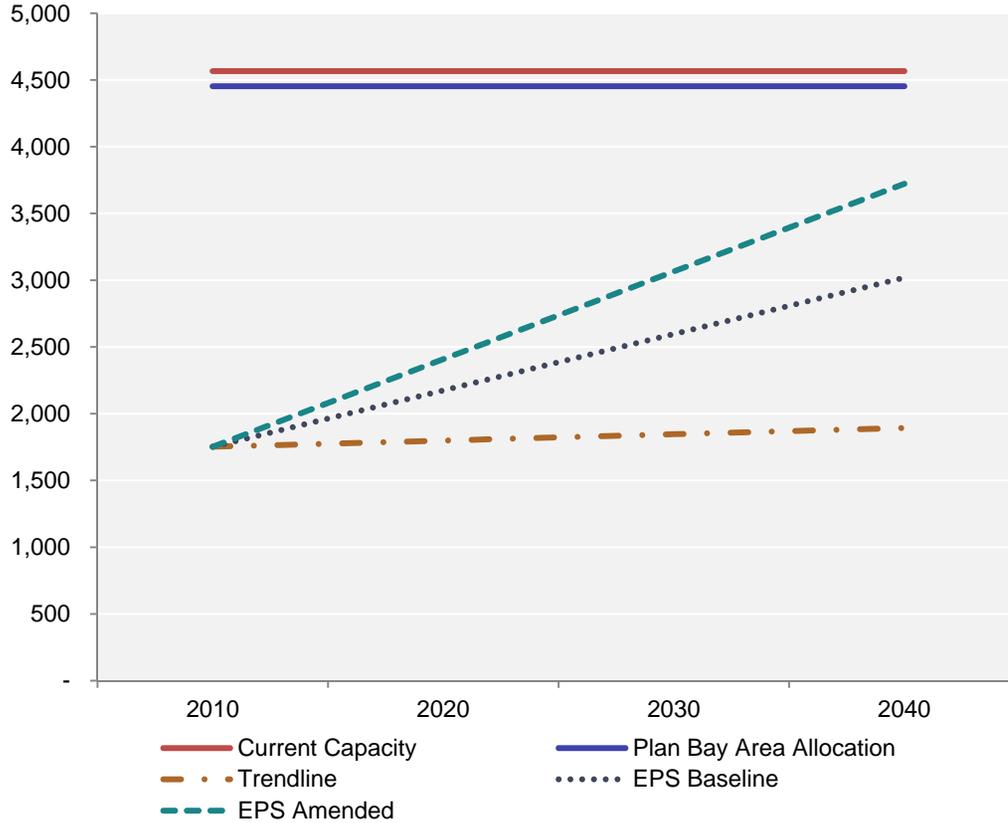
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	City has recently begun a new Specific Plan process for Downtown, to include a program EIR. Presently, zoning and other regulations are based on older documents back to 1992, but these too are supportive of intensification.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Opportunity sites are mostly older commercial developed at well below maximum allowable densities. No residential disruption.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Generally supportive of intensification. Council rejected a proposal for townhomes on a key site (Mervyn's), but is now considering a more dense housing and retail project for the same site.
		2	History of neighborhood opposition		0.00	0.00	0.00	Staff says Mission Boulevard projects for higher density development and form-based code have been supported by the community. Through Cal Poly study, community was supportive of "complete neighborhood" including housing, retail, parks, etc. Experience on former Mervyn's site proposal indicates some community resistance to intensification, but not out of the ordinary.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.40</b>	<b>0.25</b>	<b>0.05</b>	PDA added 988 housing units between 2000-2010. Greater 2-mile radius added 1,671. Pace of development required to reach PDA goals for 2040 is roughly consistent with past trends.
		2	Recent Local Development Activity (pipeline)		<b>0.05</b>	0.00	0.00	Nearly 600 units currently in the pipeline, including 104 approved and 486 pending approval.
		3	General Market Conditions		<b>0.10</b>	<b>0.05</b>	0.00	Downtown PDA and surrounding 2-mile area have relatively low incomes (\$57K median), ranking 14th out of 20 PDAs in sample. Significant retail vacancy in Downtown. Continued growth of Downtown housing may address both of these concerns over time.

**Table A-16. Hayward: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint	0.20	0.20	0.20	Moderate achievable price points make it difficult to redevelop existing uses with cash flows, as found on most of the potential opportunity sites. But City thinks there are enough severely underutilized sites to keep development momentum. Also, ample number of opportunity sites means allocated growth can be achieved at ~47 DU/acre, which can be lower cost to construct than higher-density prototypes. Still, EPS considers it likely that some development will occur at lower densities due to feasibility constraint caused by modest prices.	
		5	Parcel size and configuration	0.00	0.05	0.00	Many sites are small and would be most viable for redevelopment if assembled. This issue likely will grow more severe as most developable sites are used first.  <i>Amended assumes restoration of parcel acquisition and assembly tools.</i>	
		6	Existence of major investment disincentives	0.05	0.05	0.05	Mixed-use requirements in some corridors add to feasibility burden; perception of school district quality and some safety concerns; "Loop" traffic circulation has affected pedestrian environment; and better connectivity to transit would be desirable.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.05	0.05	Water Treatment Facility is being expanded, and City plans for new reservoirs to accommodate 2040 growth. Residential projects will likely have to make some project-specific upgrades due to age of infrastructure. Key needs are comparatively minor, and include streetscape and ped/bike facilities.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Some major capital improvements have been funded through General Fund/CIP or regional bond/grant programs. City has a Supplemental Building Construction Tax that usually goes to traffic projects, also has fees for parks, sewer, water, schools, and affordable housing. Frontage improvements required on case-by-case basis. CFD and other financing mechanisms will be explored in Specific Plan process.	
		3	PDA financing capacity	0.05	0.05	0.00	Loss of Redevelopment has been significant in Downtown Hayward. Moderate values of new housing and limited commercial market represent constraints on ability to generate much more funding.  <i>Amended assumes some external funding secured for infrastructure costs not supported by unit values.</i>	

# Hayward: South Hayward BART

Total Housing Units (Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,700	2,814	1,266	47%	Modest pricing, parcelization, and infrastructure requirements including replacement parking	1,970	73%	External infrastructure funding and removal of design constraint

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-17. Hayward: South Hayward BART**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	2,814				2011 Form Based Code Program EIR allows up to 2,814 additional dwelling units. CD+A identified roughly 80 acres of developable land, mostly underutilized at this time.	
		2	Plan Bay Area new housing allocation				2,700	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	114					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		Not expected to increase capacity, as current allowances already exceed market interest or financial feasibility.
		5	Estimated gross housing capacity at each period		2,814	2,814	2,814		
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.55		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		Plan and program EIR in place, and no major entitlement issues expected.
			<i>Community Support</i>		0.00	0.00	0.00		Community has supported plans for intensification.
	<i>Market and Investment Attractiveness</i>		0.75	0.50	0.35		Modest home values limit feasibility for redevelopment of existing uses, especially on smaller lots.		
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.15	0.20		Need for BART replacement parking and "thoroughfares" represent major constraints.		
7	EPS estimate of housing production given constraints			563	985	1,266			
8	Percentage of PDA 2040 housing allocation accommodated			20.8%	36.5%	46.9%			
		Summary		Plans are in place and support redevelopment for ample density. However, plans require "thoroughfare" features (access roads) that cut into developable acreage and feasibility on many parcels. Also, full buildout would require replacement parking for BART, which is very expensive and unlikely to be supported by modest housing prices.					

**Table A-17. Hayward: South Hayward BART**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Form Based Code and Program EIR adopted 2011.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Not a significant issue to achieve allocated growth, but Form-Based Code does allow higher densities for some existing residences.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Generally supportive of intensification, and has approved over 350 units of multifamily housing in the PDA in recent years.
		2	History of neighborhood opposition		0.00	0.00	0.00	No significant community opposition, and Code/EIR already in place.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.45	0.30	0.15	350+ multifamily units under construction presently (affordable and market-rate).
		2	Recent Local Development Activity (pipeline)		0.15	0.00	0.00	No approved or pending applications at this time.
		3	General Market Conditions		0.00	0.00	0.00	
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Moderate achievable price points make it difficult to redevelop existing uses with cash flows, as found on most of the potential opportunity sites. But City thinks there are enough severely underutilized sites to keep development momentum. Also, ample number of opportunity sites means allocated growth can be achieved at ~35 DU/acre, which can be lower cost to construct than higher-density prototypes. Still, EPS considers it likely that some development will occur at lower densities due to feasibility constraint caused by modest prices.

**Table A-17. Hayward: South Hayward BART**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration	0.00	<b>0.05</b>	<b>0.05</b>	Many sites are small and would be most viable for redevelopment if assembled. This issue likely will grow more severe as most developable sites are used first.	
		6	Existence of major investment disincentives	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	"Thoroughfare" requirements for Mission Blvd parcels severely limits potential density yield and adds to feasibility burden; perception of school district quality and some safety concerns.	
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity	0.00	<b>0.05</b>	<b>0.10</b>	Water Treatment Facility is being expanded, and City plans for new reservoirs to accommodate 2040 growth. Residential projects will likely have to make some project-specific upgrades due to age of infrastructure. Identified needs include streetscape and ped/bike facilities, as well as BART replacement parking garage to accommodate potential growth on the PDA's most significant potential site.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Some major capital improvements have been funded through General Fund/CIP or regional bond/grant programs. City has a Supplemental Building Construction Tax that usually goes to traffic projects, also has fees for parks, sewer, water, schools, and affordable housing. Frontage improvements required on case-by-case basis. No known plans for BART replacement parking garage, and "thoroughfare" requirements for some sites are also unfunded.	
		3	PDA financing capacity	0.00	<b>0.05</b>	<b>0.05</b>	BART replacement parking garage is an extraordinary cost that cannot be supported by new development on site. "Thoroughfare" requirements on some lots also represent a cost unlikely to be supported by private development.	

**Table A-17. Hayward: South Hayward BART**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	2,814				2011 Form Based Code Program EIR allows up to 2,814 additional dwelling units	
		2	Plan Bay Area new housing allocation				2,700	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	114					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		Not expected to increase capacity, as current allowances already exceed market interest or financial feasibility.
		5	Estimated gross housing capacity at each period		2,814	2,814	2,814		
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		Plan and program EIR in place, and no major entitlement issues expected. Community has supported plans for intensification. Modest home values limit feasibility for redevelopment of existing uses, especially on smaller lots. Need for BART replacement parking and "thoroughfares" represent major constraints.
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.75	0.50	0.30				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.15	0.00				
7	EPS estimate of housing production given constraints			563	985	1,970			
8	Percentage of PDA 2040 housing allocation accommodated			20.8%	36.5%	73.0%			
	Summary		Plans are in place and support redevelopment for ample density. However, plans require "thoroughfare" features (access roads) that cut into developable acreage and feasibility on many parcels. Also, full buildout would require replacement parking for BART, which is very expensive and unlikely to be supported by modest housing prices.						
			Amended assumes removal of thoroughfare requirements and securing of external funding for replacement parking.						

**Table A-17. Hayward: South Hayward BART**

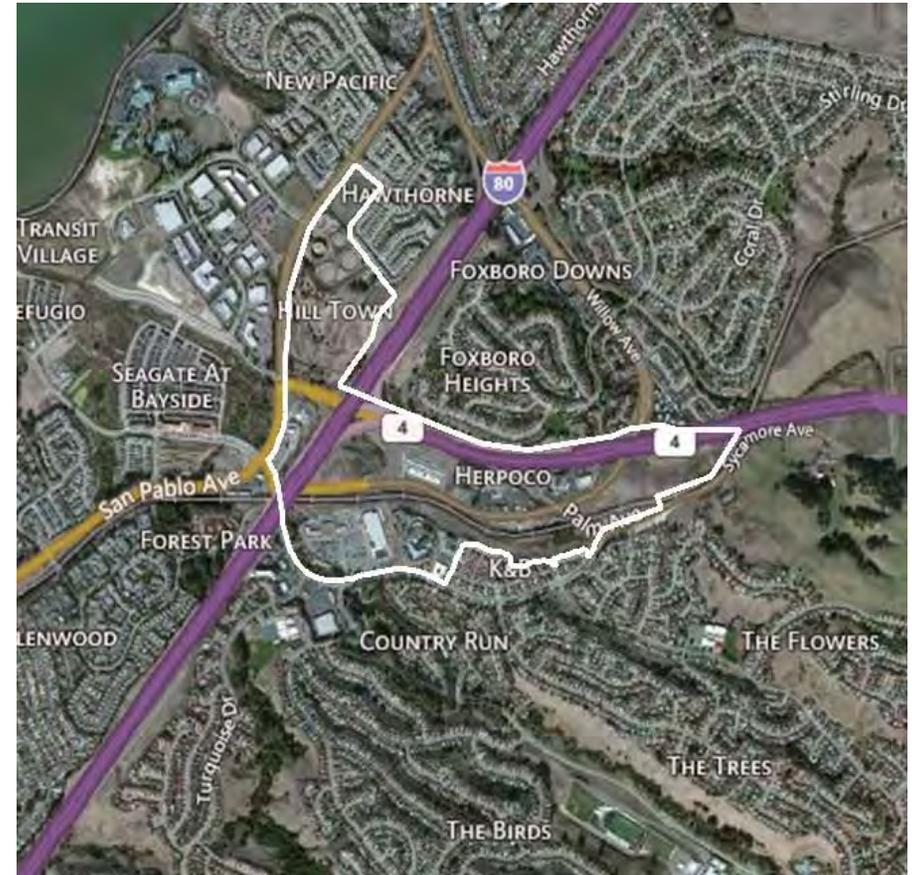
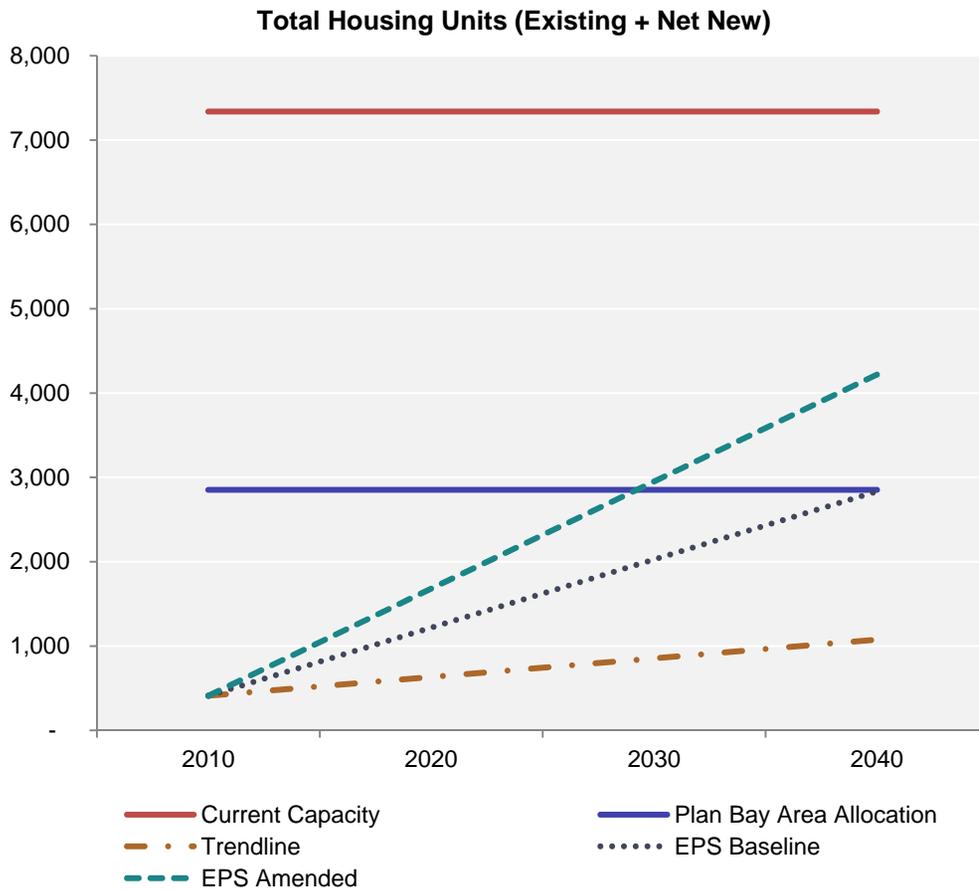
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Form Based Code and Program EIR adopted 2011.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Not a significant issue to achieve allocated growth, but Form-Based Code does allow higher densities for some existing residences.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Generally supportive of intensification, and has approved over 350 units of multifamily housing in the PDA in recent years.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No significant community opposition, and Code/EIR already in place.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.30	0.15	350+ multifamily units under construction presently (affordable and market-rate).	
		2	Recent Local Development Activity (pipeline)	0.15	0.00	0.00	No approved or pending applications at this time.	
		3	General Market Conditions	0.00	0.00	0.00		
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Moderate achievable price points make it difficult to redevelop existing uses with cash flows, as found on most of the potential opportunity sites. But City thinks there are enough severely underutilized sites to keep development momentum. Also, ample number of opportunity sites means allocated growth can be achieved at ~35 DU/acre, which can be lower cost to construct than higher-density prototypes. Still, EPS considers it likely that some development will occur at lower densities due to feasibility constraint caused by modest prices.	
		5	Parcel size and configuration	0.00	0.05	0.00	Many sites are small and would be most viable for redevelopment if assembled. This issue likely will grow more severe as most developable sites are used first.	

Amended assumes restoration of tools for parcel acquisition and assembly.

**Table A-17. Hayward: South Hayward BART**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	"Thoroughfare" requirements for Mission Blvd parcels severely limits potential density yield and adds to feasibility burden; perception of school district quality and some safety concerns.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	<b>0.05</b>	0.00	Water Treatment Facility is being expanded, and City plans for new reservoirs to accommodate 2040 growth. Residential projects will likely have to make some project-specific upgrades due to age of infrastructure. Identified needs include streetscape and ped/bike facilities, as well as BART replacement parking garage to accommodate potential growth on the PDA's most significant potential site.  <i>Amended assumes City removes "thoroughfare" requirement for development.</i>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		<b>0.05</b>	<b>0.05</b>	0.00	Some major capital improvements have been funded through General Fund/CIP or regional bond/grant programs. City has a Supplemental Building Construction Tax that usually goes to traffic projects, also has fees for parks, sewer, water, schools, and affordable housing. Frontage improvements required on case-by-case basis. No known plans for BART replacement parking garage, and "thoroughfare" requirements for some sites are also unfunded.  <i>Amended assumes BART replacement parking is funded externally.</i>
		3	PDA financing capacity		0.00	<b>0.05</b>	0.00	BART replacement parking garage is an extraordinary cost that cannot be supported by new development on site. "Thoroughfare" requirements on some lots also represent a cost unlikely to be supported by private development.  <i>Amended assumes BART replacement parking is funded externally.</i>

# Hercules: Central Hercules



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,440	6,927	2,424	99%	Modest pricing, site conditions and access	3,810	156%	External infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-18. Hercules: Central Hercules**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,927				See "Capacity Assessment for Selected Priority Development Areas".
		2	<i>Plan Bay Area</i> new housing allocation				2,440	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	4,487				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		6,927	6,927	6,927	
		6	Sum of Capacity Constraint Coefficients		0.85	0.75	0.65	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.40	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.35	0.35	
		7	EPS estimate of housing production given constraints		1,039	1,732	2,424	
		8	Percentage of PDA 2040 housing allocation accommodated		42.6%	71.0%	99.4%	
			Summary	Central Hercules has substantial development capacity that is presently and will continue to be inhibited by site and access-related constraints. While some development is expected to occur on development-ready sites, market constraints (values) and site and infrastructure-related costs will limit development in early years; however, over time, as market conditions improve, the PDA housing allocation may be realized.				

**Table A-18. Hercules: Central Hercules**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
B.	Planning and Entitlement Criteria	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Central Hercules Plan (2001) established land use plan showing mixed uses in the area and creation of a new "downtown" area in the Central Hercules PDA. A Planned Development Plan has been created that establishes zoning regulations for the area, consistent with the regulatory approach taken in other portions of the City that have resulted in creation of substantial development capacity.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None	
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Yes	
		2	History of neighborhood opposition	0.00	0.00	0.00	No opposition noted	
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	There has been limited development in the designated downtown area as development activity has concentrated in the Waterfront District PDA over the past several decades. The Recession slowed development and the City is just beginning to recover.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Muir Pointe Project, 144 TH units west of freeway; 43 SFD under construction	
		3	General Market Conditions	0.10	0.10	0.00	Market preferences for single family and attached single family remain. Demand and pricing for mixed use/multifamily will improve over the forecast period.	
		4	Financial Feasibility Constraint	0.20	0.10	0.10	Mixed use/multifamily development in Hercules will face financial feasibility constraints given site-related costs and pricing constraints in the near to mid term.	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	Key disincentive is the present limited scale of residential development and a "center" consistent with the Central Hercules Plan. Over time, as development occurs it is expected that this condition will improve.	
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity	0.15	0.15	0.15	Problems included inadequate internal circulation and access to the major highways SR 4 and I-80 (e.g. the Willow Avenue interchange)	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.10	0.10	There is no planning for financing in place to fund the needed infrastructure improvements. Major improvements to links to I-80 required external funding to complete.	
		3	PDA financing capacity	0.10	0.10	0.10	Financing capacity will remain constrained by the scale of costs set against the scale of development	

**Table A-18. Hercules: Central Hercules**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,927				See "Capacity Assessment for Selected Priority Development Areas"
		2	<i>Plan Bay Area</i> new housing allocation				2,440	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	4,487				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		6,927	6,927	6,927	
		6	Sum of Capacity Constraint Coefficients		0.85	0.75	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.40	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.35	0.15	
		7	EPS estimate of housing production given constraints		1,039	1,732	3,810	
		8	Percentage of PDA 2040 housing allocation accommodated		42.6%	71.0%	156.1%	
		Summary		<p>Central Hercules has substantial development capacity that is presently and will continue to be inhibited by site and access-related constraints. While some development is expected to occur on development-ready sites, market constraints (values) and site and infrastructure-related costs will limit development in early years; however, over time, as market conditions improve, the PDA housing allocation may be realized.</p> <p style="color: red;">Additional external funding will relieve key roadway and freeway access deficiencies and improve linkages to waterfront area.</p>				

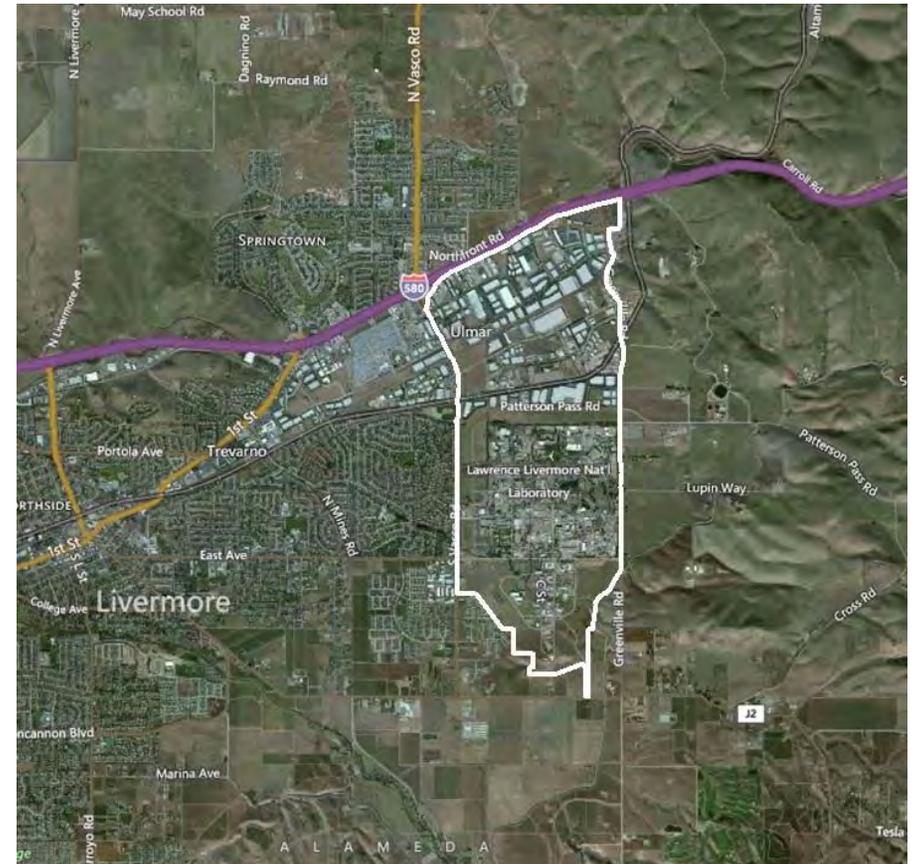
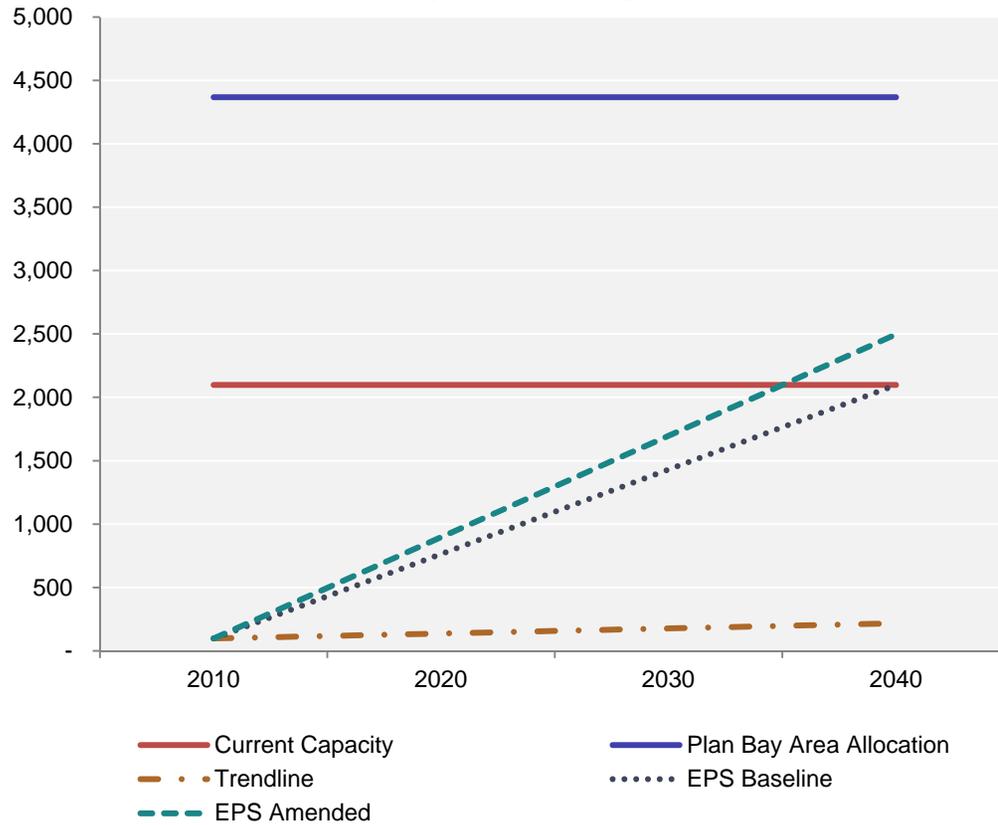
**Table A-18. Hercules: Central Hercules**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
B.	Planning and Entitlement Criteria	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Central Hercules Plan (2001) established land use plan showing mixed uses in the area and creation of a new "downtown" area in the Central Hercules PDA. A Planned Development Plan has been created that establishes zoning regulations for the area, consistent with the regulatory approach taken in other portions of the City that have resulted in creation of substantial development capacity.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None	
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Yes	
		2	History of neighborhood opposition	0.00	0.00	0.00	No opposition noted	
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	There has been limited development in the designated downtown area as development activity has concentrated in the Waterfront District PDA over the past several decades. The Recession slowed development and the City is just beginning to recover.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Muir Pointe Project, 144 TH units west of freeway; 43 SFD under construction	
		3	General Market Conditions	0.10	0.10	0.00	Market preferences for single family and attached single family remain. Demand and pricing for mixed use/multifamily will improve over the forecast period.	
		4	Financial Feasibility Constraint	0.20	0.10	0.10	Mixed use/multifamily development in Hercules will face financial feasibility constraints given site-related costs and pricing constraints in the near to mid term.	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	Key disincentive is the present limited scale of residential development and a "center" consistent with the Central Hercules Plan. Over time, as development occurs it is expected that this condition will improve.	
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity	0.15	0.15	0.15	Problems included inadequate internal circulation and access to the major highways SR 4 and I-80 (e.g. the Willow Avenue interchange)	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.10	0.00	There is no planning for financing in place to fund the needed infrastructure improvements. Major improvements to links to I-80 required external funding to complete.	
		3	PDA financing capacity	0.10	0.10	0.00	Financing capacity will remain constrained by the scale of costs set against the scale of development.	

External funding will relieve key roadway and freeway access deficiencies and improve linkages to waterfront area.

# Livermore: East Side

**Total Housing Units (Existing + Net New)**



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
4,270	2,000	2,000	47%	No plan in development, institutional (LLNL) dominates a portion of the PDA leaving limited available parcels	2,400	56%	A specific plan is begun and completed

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,000				No Specific Plan is underway but the City anticipates that one will begin in a few years. Undeveloped acreage would need to develop at a density of 17 dwelling units per acre to achieve the 2040 allocation. A project now under construction has an overall average of about 20 units per acre, but much of the land in the PDA is zoned industrial or is in institutional use (Lawrence Livermore National Lab) in the General Plan. Capacity is roughly estimated from aerial mapping.
		2	<i>Plan Bay Area</i> new housing allocation				4,270	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,270)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		25%	25%	25%	The Baseline scenario assumes that some land within the PDA changes land use from largely industrial/ institutional land uses, consistent with one townhome/small-lot single-family project currently underway in the PDA.
		5	Estimated gross housing capacity at each period		2,500	2,500	2,500	
		6	Sum of Capacity Constraint Coefficients		0.95	0.50	0.20	
			<i>Planning and Entitlement Criteria</i>		0.35	0.05	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.40	0.30	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.15	0.10	
		7	EPS estimate of housing production given constraints		125	1,250	2,000	
		8	Percentage of PDA 2040 housing allocation accommodated		2.9%	29.3%	46.8%	
		Summary		Livermore East Side PDA is developed with industrial uses and the large Lawrence Livermore National Laboratory campus. Situated adjacent to an existing ACE train station, one new residential development is now under construction, a small-lot/cottage style detached product. A specific plan is not currently anticipated for the PDA for several years. As a baseline assumption, this projection assumes that a specific plan will be developed during the planning horizon and available acreage will be developed with residential and non-residential uses and some sites with underutilized uses will be redeveloped. A lack of multifamily product in the area, the development of the site most-proximate to transit access with small lot, detached product, and a focus of the City's development on the two other PDAs which are further along in planning and development (the Downtown and the Isabel [ proposed future BART-station area]) mean that this PDA is unlikely to meet its 2040 allocation without changes to the Baseline conditions.				

**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.35	0.00	0.00	No Specific Plan is underway but the City anticipates that one will begin in a few years. Undeveloped acreage would need to develop at a density of 17 dwelling units per acre to achieve the 2040 allocation. A project now under construction has an overall	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None anticipated.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Official support is unknown at this time since rezoning has not commenced for the area as of yet.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No organized and successful opposition has been identified in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average 170 units per year between 2010 and 2040 to achieve its unit-allocation.  Multifamily housing starts in Livermore have comprised 25% of total housing starts since 1980 which is lower than the proportion for Contra Costa County, which was 30%.	
		2	Recent Local Development Activity (pipeline)	0.25	0.20	0.00	A relatively large (450+ unit) development is now underway in the PDA including single-family homes, townhomes, and apartments.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 50% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$150,000 in 2012, compared with \$80,300 Bay Area-wide.	

**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.10 per sq.ft. per month for apartments and \$390 per square foot for condos. These apartment prices are not sufficient to justify multifamily development while condo prices are close to reaching feasibility. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent years.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcel size is not a constraint for this PDA.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives for investment are known in this PDA.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.05	0.05	While the condition and capacity of existing infrastructure is not known, intensification is anticipated to require upgrades.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.15	0.10	0.05	Infrastructure needs are unknown, though much of the PDA is developed with office parks and institutional uses. We assume that intensification will require the development of an infrastructure plan.	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA is expected to be able to finance needed improvements though the magnitude of costs is unknown at this point.	

**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,000				No Specific Plan is underway but the City anticipates that one will begin in a few years. Undeveloped acreage would need to develop at a density of 17 dwelling units per acre to achieve the 2040 allocation. A project now under construction has an overall average of about 20 units per acre, but much of the land is zoned industrial or is in institutional use (Lawrence Livermore National Lab) in the General Plan.
		2	<i>Plan Bay Area</i> new housing allocation				4,270	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(2,270)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		50%	50%	50%	In this amended scenario, a Specific Plan developed for the PDA identifies a strategy for development of denser land use patterns in logical locations in the largely low-density industrial/office park PDA.
		5	Estimated gross housing capacity at each period		3,000	3,000	3,000	
		6	Sum of Capacity Constraint Coefficients		0.95	0.50	0.20	
			<i>Planning and Entitlement Criteria</i>		0.35	0.05	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.40	0.30	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.15	0.10	
		7	EPS estimate of housing production given constraints		150	1,500	2,400	
		8	Percentage of PDA 2040 housing allocation accommodated		3.5%	35.1%	56.2%	
			Summary	<p>Livermore East Side PDA is developed with industrial uses and the large Lawrence Livermore National Laboratory campus. Situated adjacent to an existing ACE train station, one new residential development is now under construction, a small-lot/cottage style detached product. A specific plan is not currently anticipated for the PDA for several years. As a baseline assumption, this projection assumes that a specific plan will be developed during the planning horizon and available acreage will be developed with residential and non-residential uses and some sites with underutilized uses will be redeveloped. A lack of multifamily product in the area, the development of the site most-proximate to transit access with small lot, detached product, and a focus of the City's development on the two other PDAs which are further along in planning and development (the Downtown and the Isabel [ proposed future BART-station area]) mean that this PDA is unlikely to meet its 2040 allocation without changes to the Baseline conditions.</p> <p>In the amended scenario, a Specific Plan for the area is quickly developed and a cohesive plan emerges with prominent and attractive locations for multifamily housing.</p>				

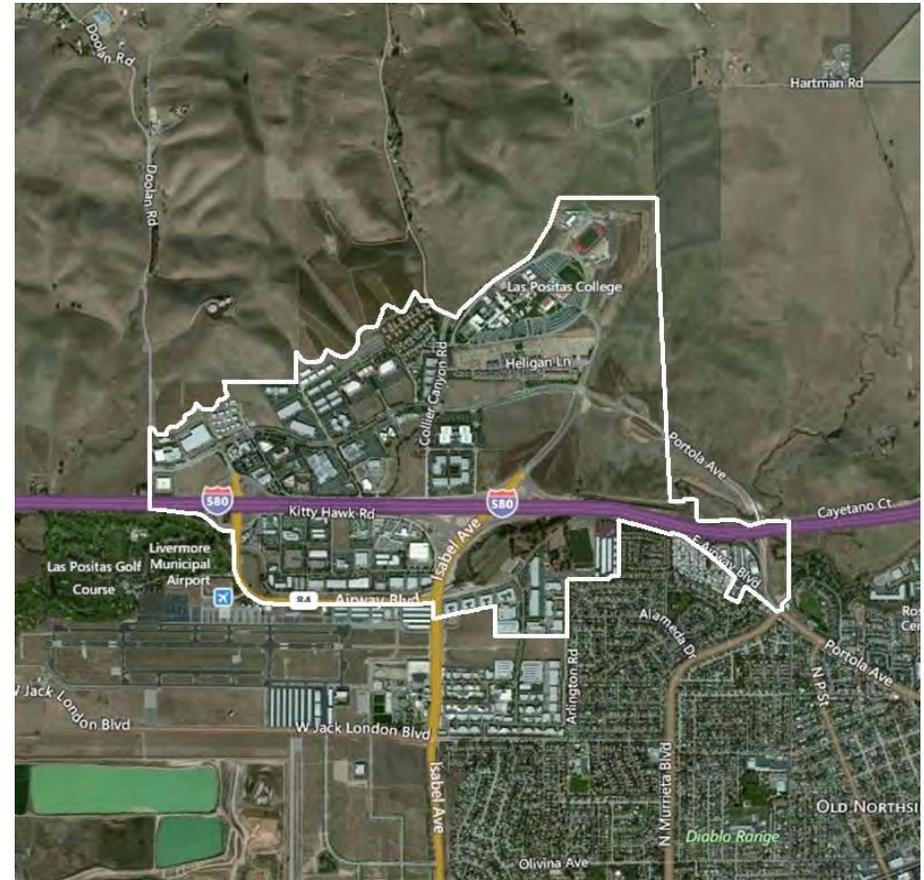
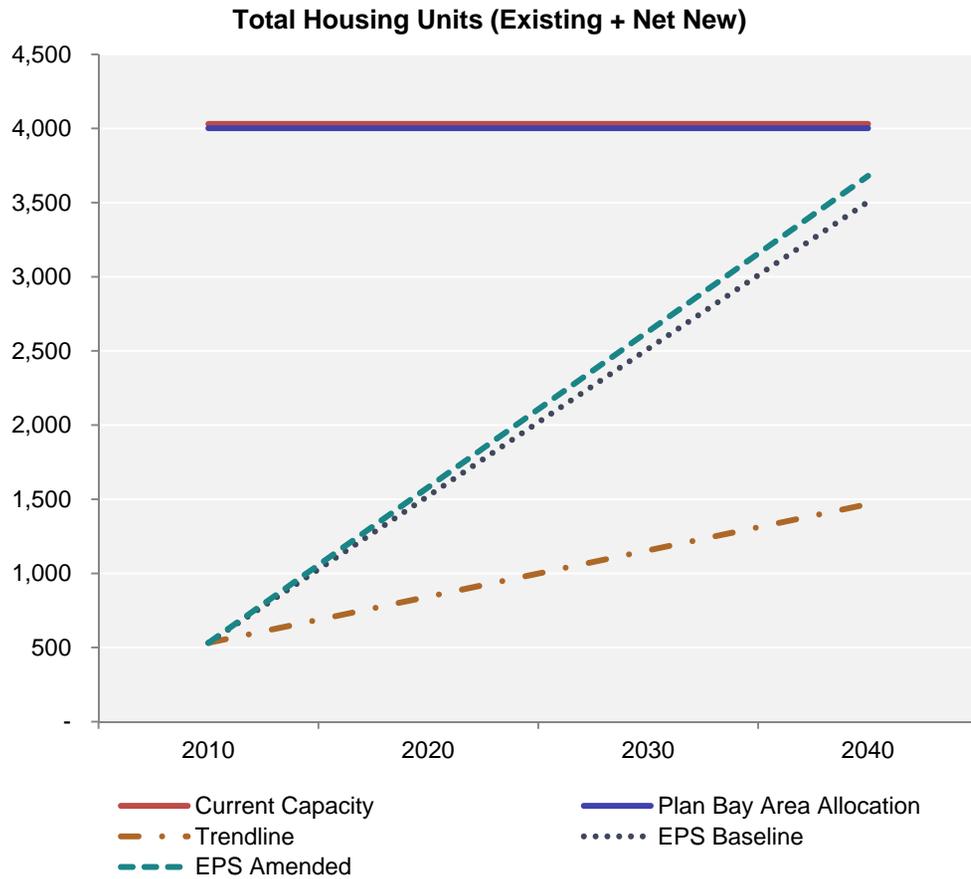
**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.35	0.00	0.00	No Specific Plan is underway but the City anticipates that one will begin in a few years. Undeveloped acreage would need to develop at a density of 17 dwelling units per acre to achieve the 2040 allocation. A project now under construction has an overall	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None anticipated.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Official support is unknown at this time since rezoning has not commenced for the area as of yet.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No organized and successful opposition has been identified in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average 170 units per year between 2010 and 2040 to achieve its unit-allocation.  Multifamily housing starts in Livermore have comprised 25% of total housing starts since 1980 which is lower than the proportion for Contra Costa County, which was 30%.	
		2	Recent Local Development Activity (pipeline)	0.25	0.20	0.00	A relatively large (450+ unit) development is now underway in the PDA including single-family homes, townhomes, and apartments.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 50% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$150,000 in 2012, compared with \$80,300 Bay Area-wide.	

**Table A-19. Livermore: East Side**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.10 per sq.ft. per month for apartments and \$390 per square foot for condos. These apartment prices are not sufficient to justify multifamily development while condo prices are close to reaching feasibility. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent years.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcel size is not a constraint for this PDA.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives for investment are known in this PDA.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.05	0.05	While the condition and capacity of existing infrastructure is not known, intensification is anticipated to require upgrades	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.15	0.10	0.05	Infrastructure needs are unknown, though much of the PDA is developed with office parks and institutional uses. We assume that intensification will require the development of an infrastructure plan.	
		3	PDA financing capacity	0.00	0.00	0.00	The PDA is expected to be able to finance needed improvements though the magnitude of costs is unknown at this point.	

# Livermore: Isabel Avenue/BART Station



## Net New Units - Allocation, Capacity, and Projection

PDA Name	Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
			Number	% of Total Allocation		Number	% of Total Allocation	
Livermore: Isabel Avenue/BART Station Planning Area	3,470	3,500	2,975	86%	Plan not yet in place (in development) and evolving market conditions	3,150	91%	Specific Plan complete. Exempt area from Citywide housing allocation process. BART or other transportation assumed to be in place, along with other improvements

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,500				City currently undertaking Specific Plan for area. Undeveloped acreage would need to develop at a density of 27 dwelling units per acre to achieve the 2040 allocation. While this local policy is not yet in place, the outcome of the Specific Plan process is likely to result in land use designations of sufficient intensity to meet the 2040 allocation.
		2	<i>Plan Bay Area</i> new housing allocation				3,470	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	30				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,500	3,500	3,500	
		6	Sum of Capacity Constraint Coefficients		0.75	0.50	0.15	
			<i>Planning and Entitlement Criteria</i>		0.10	0.05	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.40	0.25	0.10	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.20	0.00	
		7	EPS estimate of housing production given constraints		875	1,750	2,975	
		8	Percentage of PDA 2040 housing allocation accommodated		25.2%	50.4%	85.7%	
			<b>Summary</b>	The City is currently undertaking a Specific Plan for the Isabel PDA area, where a proposed BART extension from the Dublin-Pleasanton station is in the planning phase. Development in the PDA includes office parks, single-family and townhome neighborhoods, sensitive habitat areas, and undeveloped parcels. The PDA is also adjacent to the Livermore Municipal Airport, which places some constraints on development. The Specific Plan will examine ensuring that sufficient land is available to meet or exceed the PDA allocation. While the residential market in Livermore is generally strong, key constraints on multifamily residential development are: (1) the lack of a cohesive plan, (2) uncertainty related to when and type of transit improvements (e.g., BART) will be developed, and (3) though multifamily housing exists and continues to be built in the City, unknown depth of market demand for higher density product types in Livermore.				

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.05	0.05	<p>No, Specific Plan and programmatic EIR now underway with an anticipated completion of mid-2016</p> <p>The City has a growth management policy in place called the Housing Implementation Program (HIP). The HIP has reserved allocations for the Downtown Specific Plan area (which is a PDA, but is not one of the two PDAs analyzed in this report). All other developments over 5 units must apply for allocations through the HIP or through the Transferable Development Credits program. While most projects in recent years have received required allocations, these growth management programs could limit the pace of development in later years of the projection.</p>	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of the PDA designation, the Specific Plan process, and the process to plan for a BART extension.	
		2	History of neighborhood opposition	0.00	0.00	0.00	While residents are interested in preserving views of the hills and other elements of the citywide quality of life, no organized and successful opposition was found in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	<p>Since 2010, about 350 units have been constructed in the PDA at an average density of 20 units per acre (mixed of detached and attached product) and 475 units are entitled.</p> <p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average 115 units per year between 2010 and 2040 to achieve its unit-allocation.</p>	
		2	Recent Local Development Activity (pipeline)	0.10	0.05	0.00	A project has recently been entitled for about 476 units. Also, about 350 units have been built in the PDA between 2010 and 2015.	

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 50% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$120,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.00 per sq.ft. per month for apartments and \$390 per square foot for condos. These apartment prices are not sufficient to justify multifamily development while condo prices are close to reaching feasibility. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent years.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcel size is not a constraint for this PDA.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives for investment are known in this PDA.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.10	0.00	Existing infrastructure is not sufficient for intensification. Specific improvements will be defined as part of the Specific Plan process now underway.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.05	0.00	Because the Specific Plan is still underway, no CIP specific to intensification for the PDA is available.	
		3	PDA financing capacity	0.05	0.05	0.00	The City has a range of development impact fees in place. In addition, it is expected that significant outside funding would be needed for the BART or other transportation improvements in this area. While unknown, the anticipated funding/ financing mechanisms include development-based tools (impact fees, CFD, benefit assessment district, etc) and federal funding for transit.	

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,500				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				3,470	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	30					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		3,500	3,500	3,500		
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.10		
			<i>Planning and Entitlement Criteria</i>		0.10	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.40	0.25	0.10				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.15	0.00				
7	EPS estimate of housing production given constraints		875	2,100	3,150				
8	Percentage of PDA 2040 housing allocation accommodated		25.2%	60.5%	90.8%				
	<b>Summary</b>	<p>The City is currently undertaking a Specific Plan for the Isabel PDA area, where a proposed BART extension from the Dublin-Pleasanton station is in the planning phase. Development in the PDA includes office parks, single-family and townhome neighborhoods, sensitive habitat areas, and undeveloped parcels. The PDA is also adjacent to the Livermore Municipal Airport, which places some constraints on development. The Specific Plan will examine ensuring that sufficient land is available to meet or exceed the PDA allocation. While the residential market in Livermore is generally strong, key constraints on multifamily residential development are: (1) the lack of a cohesive plan, (2) uncertainty related to when and type of transit improvements (e.g., BART) will be developed, and (3) though multifamily housing exists and continues to be built in the City, unknown depth of market demand for higher density product types in Livermore.</p> <p><b>Under an amended scenario, a Specific Plan is assumed to be expeditiously completed with clear direction on priority locations for higher-density development, the Isabel PDA is added to the growth management policy as an area exempted from the HIP (along with the Downtown Specific Plan area), and various funding sources are also assumed to come together to advance the new BART station or other transportation improvements over the next decades.</b></p>							

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

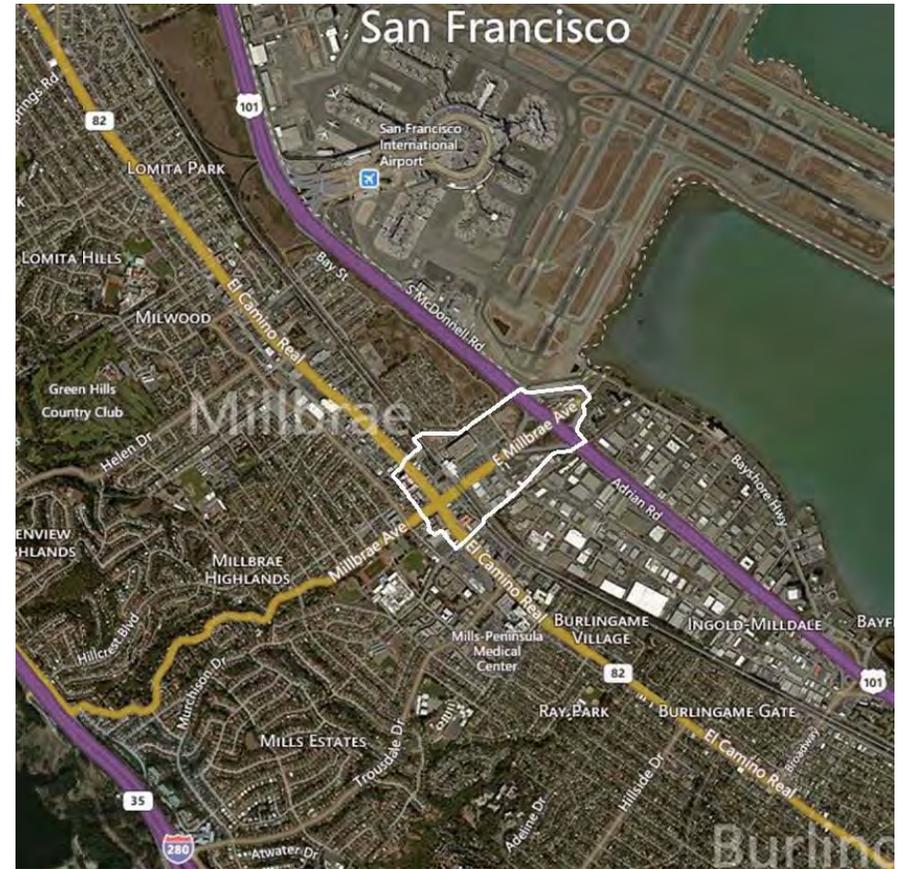
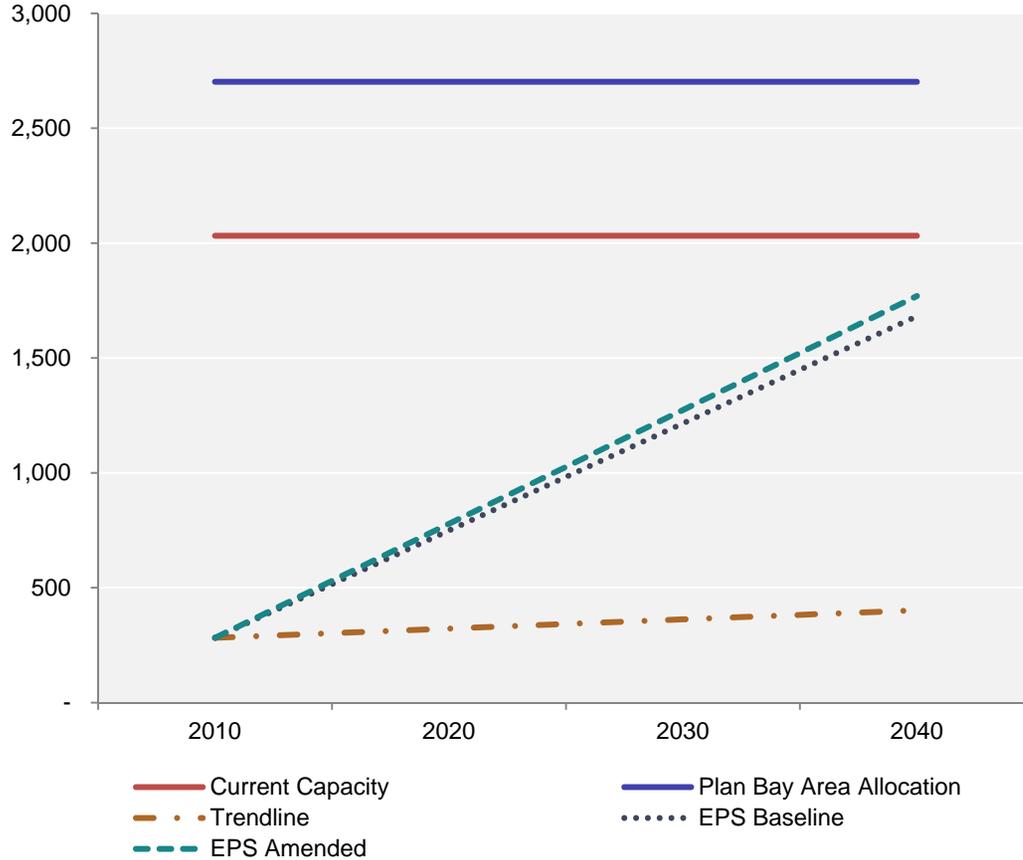
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.10	0.00	0.00	<p>No, Specific Plan and programmatic EIR now underway with an anticipated completion of mid-2016.</p> <p>The City has a growth management policy in place called the Housing Implementation Program (HIP). The HIP has reserved allocations for the Downtown Specific Plan area (which is a PDA, but is not one of the two PDAs analyzed in this report). All other developments over 5 units must apply for allocations through the HIP or through the Transferable Development Credits program. While most projects in recent years have received required allocations, these growth management programs could limit the pace of development in later years of the projection.</p> <p style="color: red;">Under the amended scenario, the Isabel PDA is exempted from the HIP process.</p>	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of the PDA designation, the Specific Plan process, and the process to plan for a BART extension.	
		2	History of neighborhood opposition	0.00	0.00	0.00	While residents are interested in preserving views of the hills and other elements of the citywide quality of life, no organized and successful opposition was found in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	<p>Since 2010, about 350 units have been constructed in the PDA at an average density of 20 units per acre (mixed of detached and attached product) and 475 units are entitled.</p> <p>Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average 115 units per year between 2010 and 2040 to achieve its unit-allocation.</p>	
		2	Recent Local Development Activity (pipeline)	0.10	0.05	0.00	A project has recently been entitled for about 476 units. Also, about 350 units have been built in the PDA between 2010 and 2015.	

**Table A-20. Livermore: Isabel Avenue/BART Station Planning Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.05	0.05	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$43,000 in 2012, compared with \$80,300 Bay Area-wide. However, population growth and percent change in growth in multifamily units since 2000 in the PDA both exceeded the same indicators for the Bay Area.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.00 per sq.ft. per month for apartments and \$390 per square foot for condos. These apartment prices are not sufficient to justify multifamily development while condo prices are close to reaching feasibility. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent years.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcels sizes are relatively large and regular.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.10	0.00	Existing infrastructure is not sufficient for intensification. Specific improvements will be defined as part of the Specific Plan process now underway.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.05	0.00	Because the Specific Plan is still underway, no CIP specific to intensification for the PDA is available.	
		3	PDA financing capacity	0.05	0.00	0.00	The City has a range of development impact fees in place. In addition, it is expected that significant outside funding would be needed for BART or other transportation improvements. While unknown, the anticipated funding/ financing mechanisms include development-based tools (impact fees, CFD, benefit assessment district, etc.) and federal funding for transit.  <i>In the amended scenario, outside funding is assumed to be achieved to support the range of improvements that are likely required to support intensification in the area. The assumed earlier achievement of these funding sources and improvements provides more time before 2040 for the market to capitalize on the investment, yielding more new homes in the period.</i>	

# Millbrae: Transit Station Area

Total Housing Units (Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,420	1,750	1,400	58%	Limited site availability	1,488	61%	Parcel assembly tools available.

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,750				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				2,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(670)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,750	1,750	1,750	
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.20	
			<i>Planning and Entitlement Criteria</i>		0.20	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.45	0.35	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.05	0.00	
		7	EPS estimate of housing production given constraints		438	1,050	1,400	
		8	Percentage of PDA 2040 housing allocation accommodated		18.1%	43.4%	57.9%	
		<b>Summary</b>		A process to complete the Millbrae Station Area Specific Plan is now underway. The Station Area, adjacent to Millbrae BART and Caltrain stations and including portions of El Camino Real, is currently characterized by relatively large-scale development and large parcels. Pipeline projects include two projects with a mix of uses, anticipated to include more than 800 multifamily residential units total. A lack of developable land and competition from non-residential uses is a major constraint on the achievement of the PDA allocation. The City has also had a history of relatively low levels of residential growth. Nonetheless, the PDA's excellent transit access, Specific Plan process, and developer interest are likely to result in development at a faster pace than has historically been seen in the City.				

**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.20	0.00	0.00	Specific Plan is now underway.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None expected.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been generally supportive of planning for the PDA.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No successful community opposition has been mounted to multifamily development in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.15	0.10	0.05	Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.  The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average almost 50 units per year between 2010 and 2040 to achieve its unit-allocation, an increase from the last 20 years.	
		2	Recent Local Development Activity (pipeline)	0.15	0.10	0.00	Projects near the Millbrae BART station are being evaluated which include about 800 residential units total (along with commercial and hospitality uses).	

**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.10	0.10	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 29% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$57,000 in 2012, compared with \$80,300 Bay Area-wide. However, these seem to be changing conditions as the population in the PDA area increases.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, were very high, averaging \$3.00 per sq.ft. per month for apartments and \$700 per square foot for condos. These apartment prices are sufficient to justify multifamily development. Existing uses may pose feasibility constraints for new development.	
		5	Parcel size and configuration	0.05	0.05	0.05	Parcel size and configuration along El Camino Real poses problems for new development in terms of parcel assemblage and displacement of existing uses.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	No known constraints.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	A CIP will be needed as part of the station area planning efforts.	
		3	PDA financing capacity	0.00	0.00	0.00	It is anticipated that the station area planning efforts will result in a financing plan to fund needed upgrade.	

**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,750				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(670)					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		1,750	1,750	1,750		
		6	Sum of Capacity Constraint Coefficients		0.70	0.35	0.15		
			<i>Planning and Entitlement Criteria</i>		0.20	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.40	0.30	0.15				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.05	0.00				
7	EPS estimate of housing production given constraints			525	1,138	1,488			
8	Percentage of PDA 2040 housing allocation accommodated			21.7%	47.0%	61.5%			
			<b>Summary</b>	<p>A process to complete the Millbrae Station Area Specific Plan is now underway. The Station Area, adjacent to Millbrae BART and Caltrain stations and including portions of El Camino Real, is currently characterized by relatively large-scale development and large parcels. Pipeline projects include two projects with a mix of uses, anticipated to include more than 800 multifamily residential units total. A lack of developable land and competition from non-residential uses is a major constraint on the achievement of the PDA allocation. The City has also had a history of relatively low levels of residential growth. Nonetheless, the PDA's excellent transit access, Specific Plan process, and developer interest are likely to result in development at a faster pace than has historically been seen in the City.</p> <p><b>In the amended scenario, parcel assemble tools are available to help overcome the financial feasibility constraint for the many parcels in the plan area with low-intensity uses which would need to be displaced for higher density uses to be developed.</b></p>					

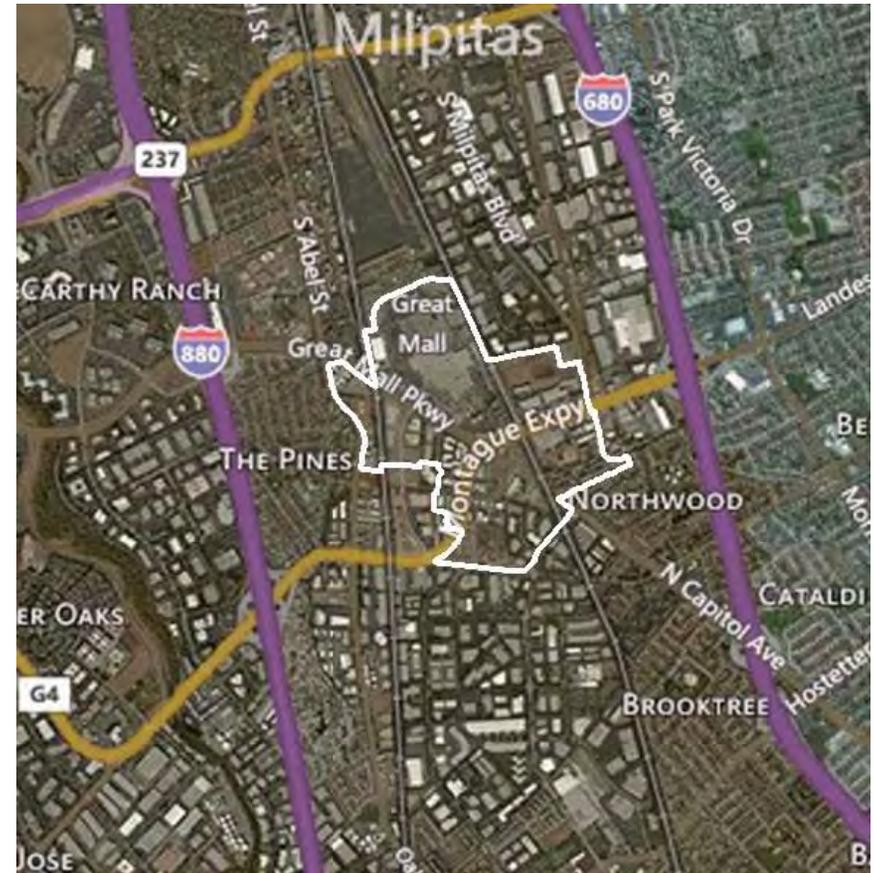
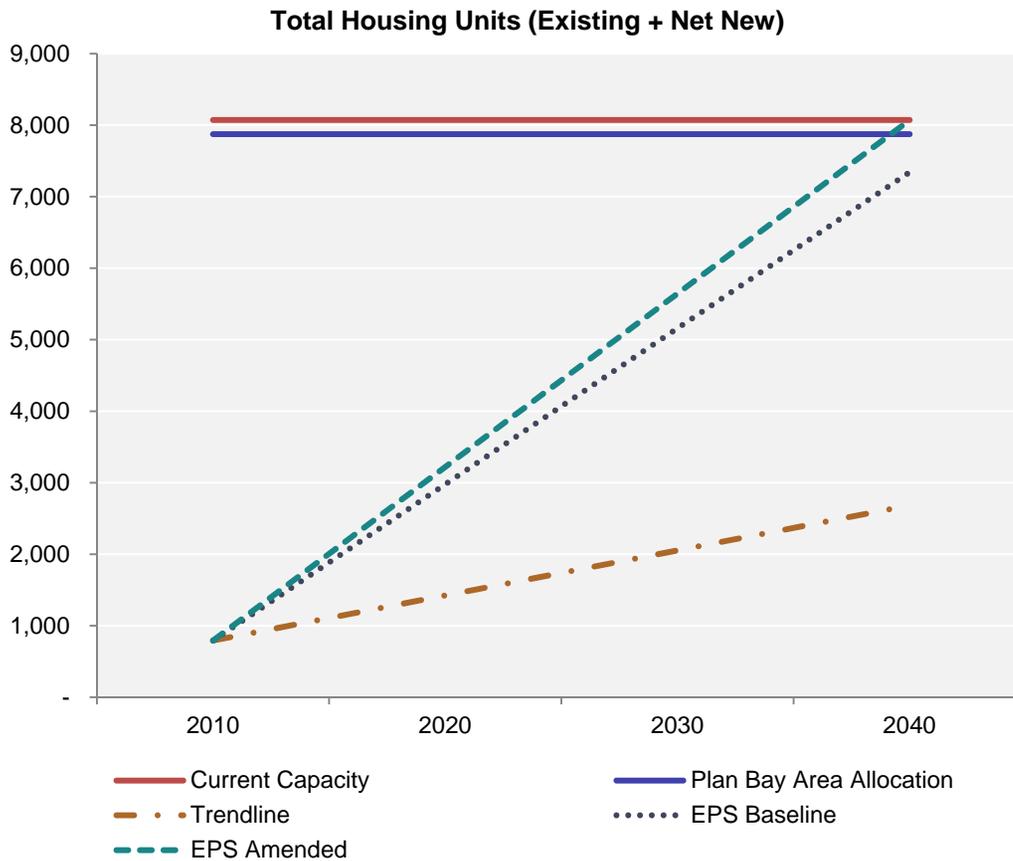
**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.20	0.00	0.00	Specific Plan is now underway	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been generally supportive of planning for the PDA.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No successful community opposition has been mounted to multifamily development in the PDA>	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.15	0.10	0.05	Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.  The City as a whole averaged about 35 units permitted per year between 1990 and 2013. The PDA would need to average almost 50 units per year between 2010 and 2040 to achieve its unit-allocation, an increase from the last 20 years.  Multifamily housing permits in Burlingame have comprised 80% of total housing starts since 1980 which is higher to the proportion for San Mateo County, about 50%.	
		2	Recent Local Development Activity (pipeline)	0.15	0.10	0.00	Projects near the Millbrae BART station are being evaluated which include about 800 residential units total (along with commercial and hospitality uses).	
		3	General Market Conditions	0.10	0.10	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 29% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$57,000 in 2012, compared with \$80,300 Bay Area-wide. However, these seem to be changing conditions as the population in the PDA area increases.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, were very high, averaging \$3.00 per sq.ft. per month for apartments and \$700 per square foot for condos. These apartment prices are sufficient to justify multifamily development. Existing uses may pose feasibility constraints for new development.	

**Table A-21. Millbrae: Transit Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	Parcel size and configuration along El Camino Real poses problems for new development in terms of parcel assemblage and displacement of existing uses.  <i>In the amended scenario, this constraint is reduced as parcel assemble tools allow the City or another entity to assemble underutilized properties for redevelopment.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	None known constraints.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	A CIP will be needed as part of the station area planning efforts.	
		3	PDA financing capacity	0.00	0.00	0.00	It is anticipated that the station area planning efforts will result in a financing plan to fund needed upgrade.	

# Milpitas: Transit Area



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
7,080	7,278	7,080	93%	Infill parcelization and value of existing uses	7,278	103%	Parcel assembly tools available and infrastructure resources available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	7,278				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				7,080	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	198					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		7,278	7,278	7,278		
		6	Sum of Capacity Constraint Coefficients		0.50	0.25	0.10		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.50	0.25	0.10				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00				
7	EPS estimate of housing production given constraints		3,639	5,459	6,550				
8	Percentage of PDA 2040 housing allocation accommodated		51.4%	77.1%	92.5%				
		Summary	The City's Transit Area Specific Plan area, surrounding the future BART station now under construction, has seen a significant amount of redevelopment in few years since the plan was adopted by the City. Buildout of the Specific Plan indicate that the medium density option (the Plan has minimum and maximum densities) is likely to produce 7,100 dwelling units. However, development projects constructed and in planning in the area are trending toward the lower end of the density range. While the City has experienced a significant amount of rental rate growth, new development has tended to achieve the maximum practicable density without podium-type development. A key challenge to achieving the PDA allocation is ability of market prices to support more costly development types. In addition, as development progress, fewer readily redevelopable sites will remain, creating a further financial feasibility constraint.						

**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None anticipated.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive if multifamily in this PDA.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No successful and organized opposition is active in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	Investment in new housing in Santa Clara County has recovered fully since the Recession. The total number of units permitted in the County in 2014 was almost 10,000 units, well above the 6,100 permits reached in the previous peak of 2006. This is higher than the number of housing permits Bay Area-wide, which reached about 80% of the 2003-peak, in 2014.  The City as a whole averaged about 300 units permitted per year between 1980 and 2013. The PDA would need to average 236 units per year between 2010 and 2040 to achieve its unit-allocation, a large portion of the Citywide-total.	
		2	Recent Local Development Activity (pipeline)	0.15	0.00	0.00	The City has a relatively large pipeline of projects in application and pre-development phase and has seen a significant amount of construction in the areas adjacent to the now under-construction BART station.	

**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively stronger market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 46% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$92,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.25	0.20	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$480 per square foot for condos. While these values are sufficient to justify development costs for multifamily products, they fall short of supporting the mid-rise and podium costs that are needed to fully achieve the unit-allocation to this PDA. This will be a constraint as development progresses and densities will need to increase if the allocation is to be met.	
		5	Parcel size and configuration	0.00	0.00	0.05	Parcels transacting today are developable but land is anticipated to be scarce in the out-years, unless the configuration of the Great Mall is substantially changed.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing conditions are sufficient for existing and near-term development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Yes, the Specific Plan includes a financing plan for infrastructure to support intensification.	
		3	PDA financing capacity	0.00	0.00	0.00	The Specific Plan includes an area-wide impact fee to finance improvements.	
		4	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Yes, the Specific Plan includes a financing plan for infrastructure to support intensification.	

**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	7,278				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				7,080	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	198					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		7,278	7,278	7,278		
		6	Sum of Capacity Constraint Coefficients		0.50	0.15	0.00		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.45	0.15	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.00	0.00		
7	EPS estimate of housing production given constraints		3,639	6,186	7,278				
8	Percentage of PDA 2040 housing allocation accommodated		51.4%	87.4%	102.8%				
	Summary	<p>The City's Transit Area Specific Plan area, surrounding the future BART station now under construction, has seen a significant amount of redevelopment in few years since the plan was adopted by the City. Buildout of the Specific Plan indicate that the medium density option (the Plan has minimum and maximum densities) is likely to produce 7,100 dwelling units. However, development projects constructed and in planning in the area are trending toward the lower end of the density range. While the City has experienced a significant amount of rental rate growth, new development has tended to achieve the maximum practicable density without podium-type development. A key challenge to achieving the PDA allocation is ability of market prices to support more costly development types. In addition, as development progress, fewer readily redevelop able sites will remain, creating a further financial feasibility constraint.</p> <p><b>In an amended scenario, parcel assembly tools and outside funding would reduce the financial feasibility constraint. Note that currently development is expected to continue to go forward with the Area Wide Impact Fees, however, to the extent improvement costs could be covered by outside funding, higher density development may be achieved.</b></p>							

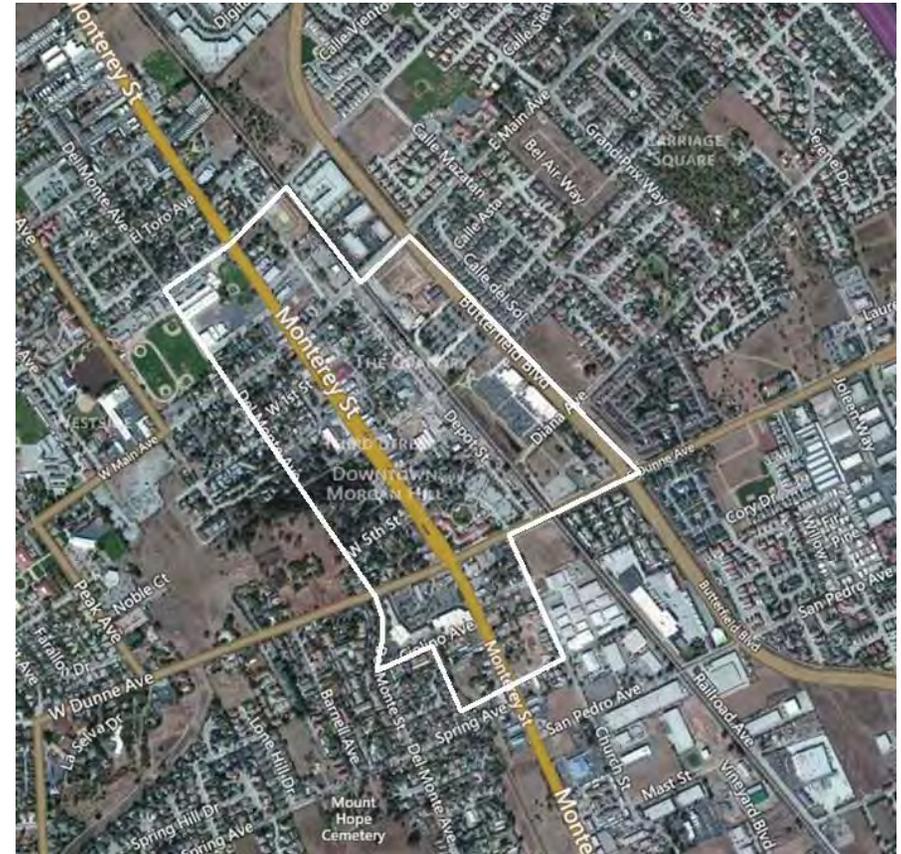
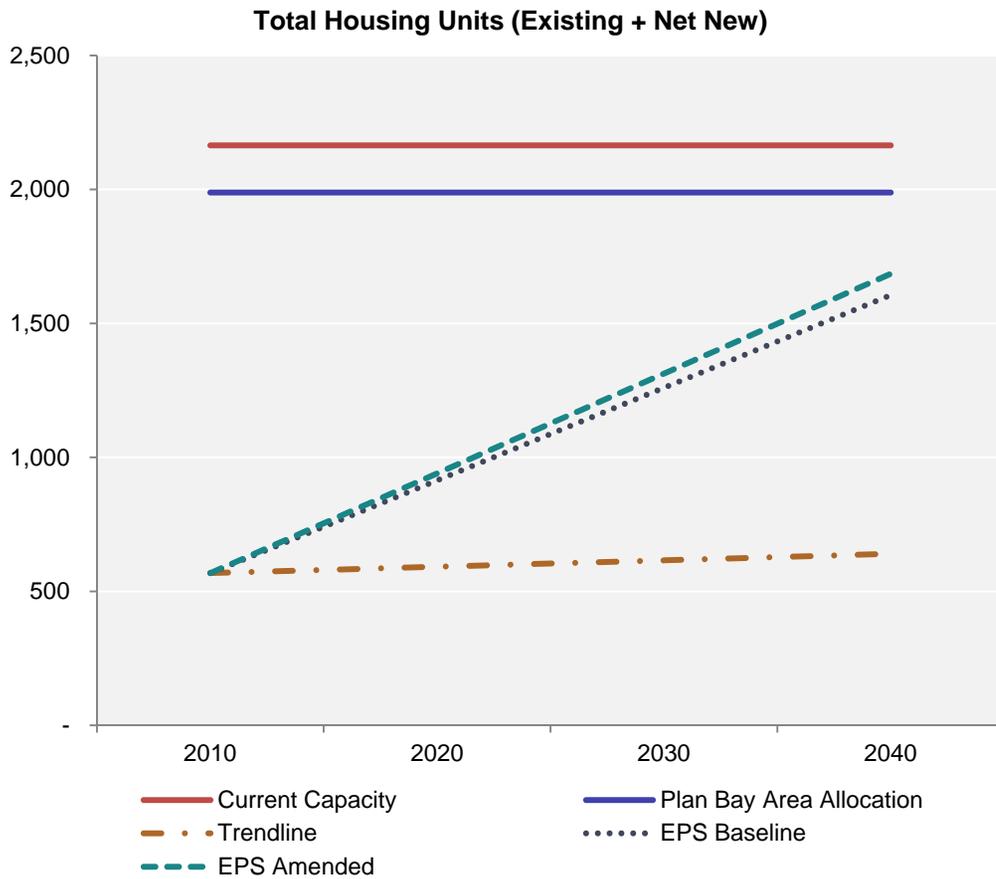
**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00		
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00		
		2	History of neighborhood opposition	0.00	0.00	0.00		
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.10	0.05	0.00	Investment in new housing in Santa Clara County has recovered fully since the Recession. The total number of units permitted in the County in 2014 was almost 10,000 units, well above the 6,100 permits reached in the previous peak of 2006. This is higher than the number of housing permits Bay Area-wide, which reached about 80% of the 2003-peak, in 2014.  The City as a whole averaged about 300 units permitted per year between 1980 and 2013. The PDA would need to average 236 units per year between 2010 and 2040 to achieve its unit-allocation, a large portion of the Citywide-total.	
		2	Recent Local Development Activity (pipeline)	0.15	0.00	0.00	The City has a relatively large pipeline of projects in application and pre-development phase and has seen a significant amount of construction in the areas adjacent to the now under-construction BART station.	
		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively stronger market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 46% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$92,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.20	0.10	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$480 per square foot for condos. While these values are sufficient to justify development costs for multifamily products, they fall short of supporting the mid-rise and podium costs that are needed to fully achieve the unit-allocation to this PDA. This will be a constraint as development progresses and densities will need to increase if the allocation is to be met.  <b>In an amended scenario, outside funding sources allow a reduction in impact fees for certain, high-density development that utilize land more efficiently in the TASP.</b>	

**Table A-22. Milpitas: Transit Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	Parcels transacting today are developable but land is anticipated to be scarce in the out-years, unless the configuration of the Great Mall is substantially changed.  <i>In an amended scenario, parcel assemble tools create more sites available for redevelopment.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.00	0.00	Existing conditions are sufficient for existing and near-term development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Yes, the Specific Plan includes a financing plan for infrastructure to support intensification.	
		3	PDA financing capacity	0.00	0.00	0.00	The Specific Plan includes an area-wide impact fee to finance improvements.	

# Morgan Hill: Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,420	1,596	1,037	73%	Market conditions	1,117	79%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,596				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	176				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,596	1,596	1,596	
		6	Sum of Capacity Constraint Coefficients		0.70	0.45	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.10	0.10	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.35	0.25	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		479	878	1,037	
		8	Percentage of PDA 2040 housing allocation accommodated		33.7%	61.8%	73.1%	
			Summary	The Morgan Hill Downtown Specific Plan, adopted in 2009, has guided development in the Downtown/VTA/Caltrain location. Since 2010, about 80 units (townhome and apartment) have been constructed in the PDA. Another 140 units are in the final planning stages. While market factors in the City of Morgan Hill are relatively strong, the absorption of market-rate multifamily product types has been relatively slow. In addition, the number and size of available sites is constrained in the Downtown PDA and financial feasibility constraints are such that new development is unlikely to be able to displace existing, lower intensity but financially viable uses.				

**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.10	0.10	Yes, the City adopted a plan in 2003 and make updates in 2007. However, additional entitlement work is needed as the City approaches its "growth cap" (not more than 48,000 people by 2020) The cap will need to be raised in 2016 to accommodate continued growth in the PDA. The risk of this election is included in this criterion.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None needed.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of multifamily development in the Downtown area.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No successful and organized opposition is active in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.05	0.05	0.05	Investment in new housing in Santa Clara County has recovered fully since the Recession. The total number of units permitted in the County in 2014 was almost 10,000 units, well above the 6,100 permits reached in the previous peak of 2006. This is higher than the number of housing permits Bay Area-wide, which reached about 80% of the 2003-peak, in 2014.  The City as a whole averaged about 240 units permitted per year between 1980 and 2014 and has exceeded its mid-2000s permit peak, with more than 340 units in 2014 permitted. The PDA would need to average 50 units per year between 2010 and 2040 to achieve its unit-allocation.	
		2	Recent Local Development Activity (pipeline)	0.25	0.00	0.00	About 140 units are in the pipeline and about 80 units have been built in the PDA since 2010.	
		3	General Market Conditions	0.15	0.10	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 19% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$48,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.25	0.20	0.15	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.10 per sq.ft. per month for apartments and \$380 per square foot for condos. These sale prices are sufficient to justify the type of density envisioned in the area though the apartment rates are below typical levels of feasibility. Though financial feasibility is a constraint now for rentals, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.	

**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Not a known constraint.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None known.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	None known.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Yes, the Downtown plan includes this assessment.
		3	PDA financing capacity		0.00	0.00	0.00	The City has impact fees in place to finance improvements.

**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,596				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	Plan Bay Area new housing allocation				1,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	176				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,596	1,596	1,596	
		6	Sum of Capacity Constraint Coefficients		0.65	0.40	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.10	0.10	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.65	0.30	0.20			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00			
7	EPS estimate of housing production given constraints		559	958	1,117			
8	Percentage of PDA 2040 housing allocation accommodated		39.3%	67.4%	78.7%			
	<b>Summary</b>	<p>The Morgan Hill Downtown Specific Plan, adopted in 2009, has guided development in the Downtown/VTA/Caltrain location. Since 2010, about 80 units (townhome and apartment) have been constructed in the PDA. Another 140 units are in the final planning stages. While market factors in the City of Morgan Hill are relatively strong, the absorption of market-rate multifamily product types has been relatively slow. In addition, the number and size of available sites is constrained in the Downtown PDA and financial feasibility constraints are such that new development is unlikely to be able to displace existing, lower intensity but financially viable uses.</p> <p><b>In the amended scenario, the City or another entity has parcel assembly tools which would increase the number of available parcels for redevelopment.</b></p>						

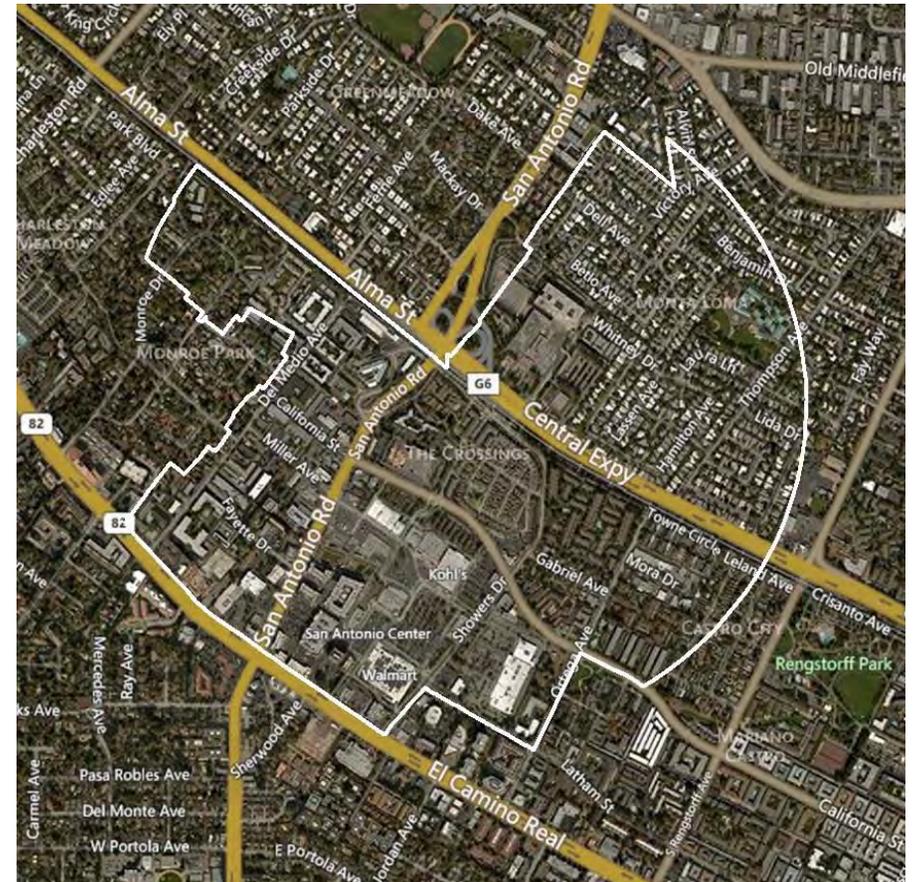
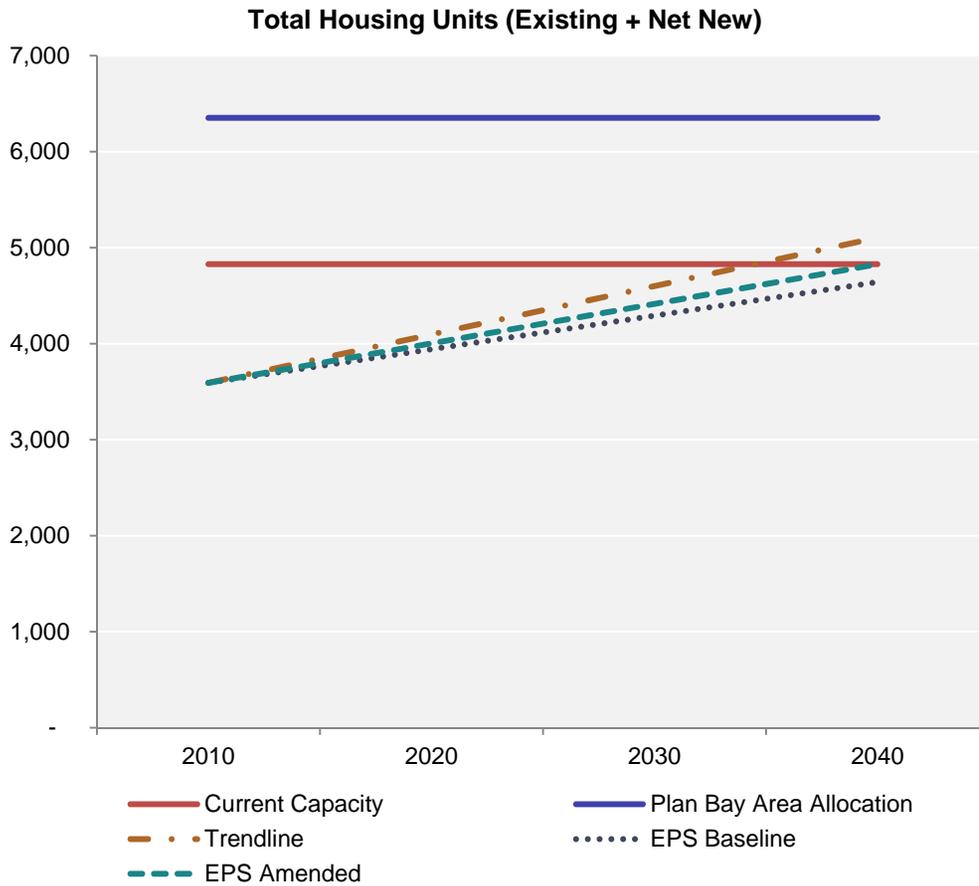
**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.10	0.10	Yes, the City adopted a plan in 2003 and make updates in 2007. However, additional entitlement work is needed as the City approaches its "growth cap" (not more than 48,000 people by 2020) The cap will need to be raised in 2016 to accommodate continued growth in the PDA. The risk of this election is included in this criterion.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None needed.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Elected officials have been supportive of multifamily development in the Downtown area.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No successful and organized opposition is active in the PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.05	0.05	0.05	Investment in new housing in Santa Clara County has recovered fully since the Recession. The total number of units permitted in the County in 2014 was almost 10,000 units, well above the 6,100 permits reached in the previous peak of 2006. This is higher than the number of housing permits Bay Area-wide, which reached about 80% of the 2003-peak, in 2014.  The City as a whole averaged about 240 units permitted per year between 1980 and 2014 and has exceeded its mid-2000s permit peak, with more than 340 units in 2014 permitted. The PDA would need to average 50 units per year between 2010 and 2040 to achieve its unit-allocation.	
		2	Recent Local Development Activity (pipeline)	0.25	0.00	0.00	About 140 units are in the pipeline and about 80 units have been built in the PDA since 2010.	
		3	General Market Conditions	0.15	0.10	0.05	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions, though population growth was higher than Bay Area-wide rates. The proportion of PDA residents with 4-year college degree or higher was 19% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$48,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.20	0.15	0.10	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.10 per sq.ft. per month for apartments and \$380 per square foot for condos. These sale prices are sufficient to justify the type of density envisioned in the area though the apartment rates are below typical levels of feasibility. Though financial feasibility is a constraint now for rentals, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.  <b>In the amended scenario, parcel assembly tools help to create more viable sites for redevelopment.</b>	

**Table A-23. Morgan Hill: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	
		6	Existence of major investment disincentives		0.00	0.00	0.00	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	None known.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Yes, the Downtown plan includes this assessment.
		3	PDA financing capacity		0.00	0.00	0.00	Financing capacity was not specifically addressed in the Downtown Specific Plan as many of the identified improvements - such as complete streets -

# Mountain View: San Antonio



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,760	1,235	1,050	38%	Site availability an capacity	1,235	45%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-24. Mountain View: San Antonio**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,235				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(1,525)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period	1,235	1,235	1,235	1,235	This PDA is relatively small and mixed use. Limited capacity is the only real constraint	
		6	Sum of Capacity Constraint Coefficients		0.50	0.25	0.15		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.35	0.20	0.10		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.05	0.05		
		7	EPS estimate of housing production given constraints		618	926	1,050		
		8	Percentage of PDA 2040 housing allocation accommodated		22.4%	33.6%	38.0%		
			Summary	Relatively small size of the San Antonio PDA and its existing and planned commercially-dominated land uses offer few opportunity sites constraining the ability of the PDA to accommodate the PDA housing allocation.					

**Table A-24. Mountain View: San Antonio**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	City Precise Plan and EIR is in place.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by recent project approvals and plan adoptions.
		2	History of neighborhood opposition		0.00	0.00	0.00	No active opposition to PDA development. Concerns exist regarding inclusion of more affordable housing in the area.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.25	0.10	0.00	Development in the San Antonio PDA has been constrained by its existing commercial uses; there has been continued revitalization of the shopping center over the years. Development in the City in recent years reflects the strong sub-regional market conditions for residential and commercial development but also the constraints associated with limited available development sites.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Development activity including recent construction, approved projects and projects in the approval process in the City reflect strong sub-regional housing market conditions.
		3	General Market Conditions		0.00	0.00	0.00	General market conditions for residential development in Mountain View presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Site assembly costs may create feasibility challenges for multifamily and mixed use development throughout the forecast.
		5	Parcel size and configuration		0.10	0.10	0.10	The small size of this PDA and its orientation towards commercial uses limit opportunities for housing development
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	There will be need for improvements to existing infrastructure surrounding and serving the site including roadway improvements and water service utilities
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.00	0.00	City is updating and expanding its financing sources including utility charges and impact fees to help pay for needed infrastructure
		3	PDA financing capacity		0.00	0.00	0.00	New development will provide substantial infrastructure financing capacity

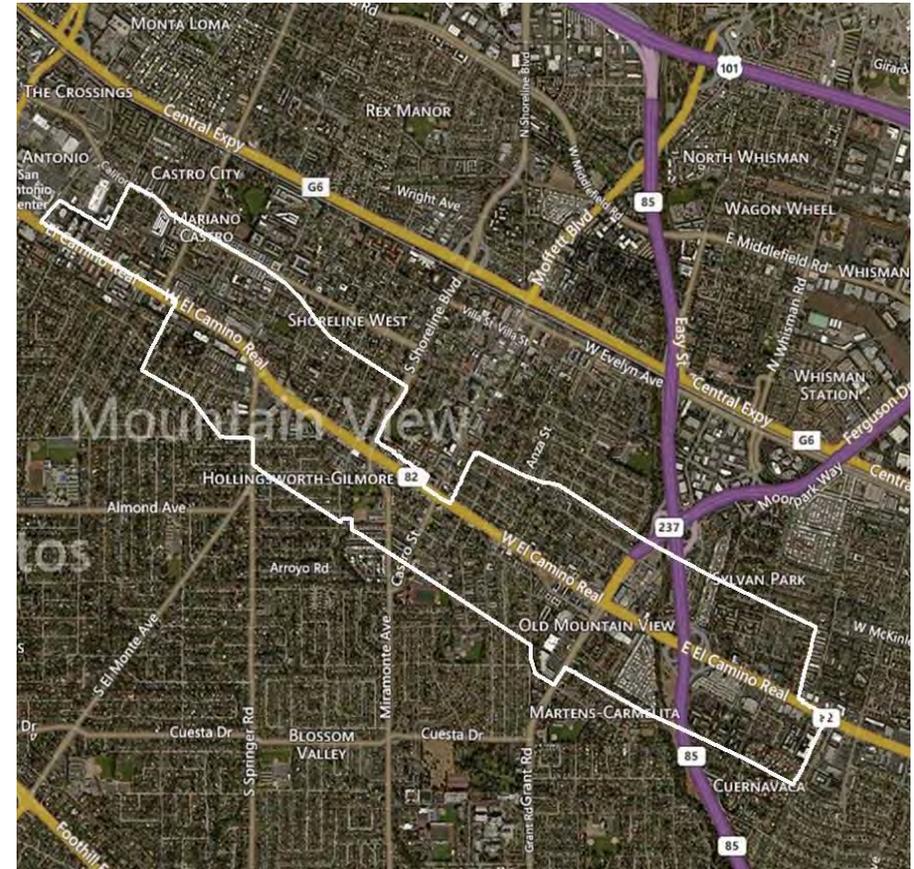
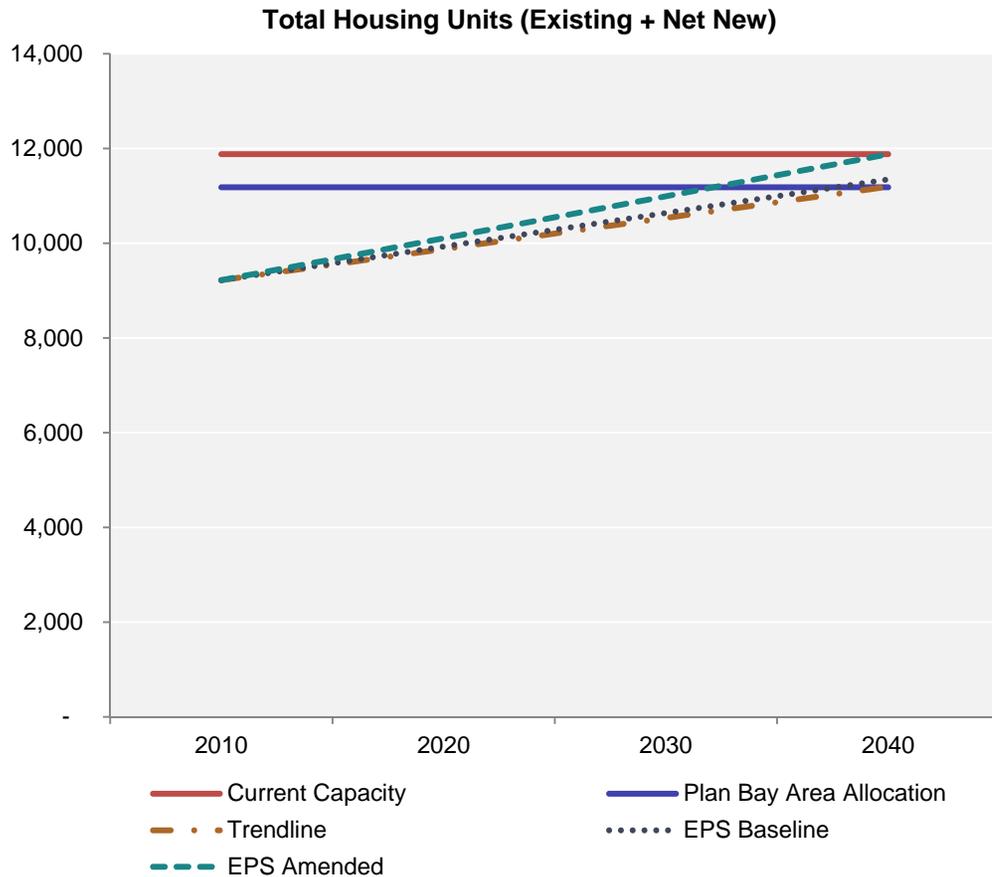
**Table A-24. Mountain View: San Antonio**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,235				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(1,525)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		1,235	1,235	1,235	This PDA is relatively small and mixed use. Limited capacity is the only real constraint	
		6	Sum of Capacity Constraint Coefficients		0.50	0.20	0.00		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.35	0.15	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.05	0.00		
		7	EPS estimate of housing production given constraints		618	988	1,235		
		8	Percentage of PDA 2040 housing allocation accommodated		22.4%	35.8%	44.7%		
			Summary	Relatively small size of the San Antonio PDA and its existing and planned commercially-dominated land uses offer few opportunity sites constraining the ability of the PDA to accommodate the PDA housing allocation.					
				<b>Efforts to assemble parcels and promote mixed uses prove successful.</b>					

**Table A-24. Mountain View: San Antonio**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	City Precise Plan and EIR is in place.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by recent project approvals and plan adoptions.
		2	History of neighborhood opposition		0.00	0.00	0.00	No active opposition to PDA development. Concerns exist regarding inclusion of more affordable housing in the area.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.25	0.10	0.00	Development in the San Antonio PDA has been constrained by its existing commercial uses; there has been continued revitalization of the shopping center over the years. Development in the City in recent years reflects the strong sub-regional market conditions for residential and commercial development but also the constraints associated with limited available development sites.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Development activity including recent construction, approved projects and projects in the approval process in the City reflect strong sub-regional housing market conditions.
		3	General Market Conditions		0.00	0.00	0.00	General market conditions for residential development in Mountain View presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Site assembly costs may create feasibility challenges for multifamily and mixed use development throughout the forecast.
		5	Parcel size and configuration		0.10	0.05	0.00	The small size of this PDA and its orientation towards commercial uses limit opportunities for housing development.  <b>Efforts to assemble parcels and promote mixed uses prove successful.</b>
		6	Existence of major investment disincentives		0.00	0.00	0.00	None Noted
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.00	There will be need for improvements to existing infrastructure surrounding and serving the site including roadway improvements and water service utilities
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.00	0.00	City is updating and expanding its financing sources including utility charges and impact fees to help pay for needed infrastructure
		3	PDA financing capacity		0.00	0.00	0.00	New development will provide substantial infrastructure financing capacity

# Mountain View: El Camino Real



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,960	2,660	2,128	109%	Infill parcelization	2,660	136%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-25. Mountain View: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,660				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,960	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	700				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,660	2,660	2,660	
		6	Sum of Capacity Constraint Coefficients		0.55	0.30	0.20	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.45	0.25	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.05	0.00	
		7	EPS estimate of housing production given constraints		1,197	1,862	2,128	
		8	Percentage of PDA 2040 housing allocation accommodated		61.1%	95.0%	108.6%	
		Summary		Opportunity sites along the El Camino Corridor in Mountain View create substantial capacity for residential and mixed use development, despite constraints including shallow parcel depths and viable existing uses.				

**Table A-25. Mountain View: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Precise Plan adopted for the El Camino Corridor. Program level EIR completed.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by recent project approvals and plan adoptions.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.35	0.15	0.00	Development in the El Camino Corridor PDA has been constrained by its existing commercial uses; there has been continued revitalization of commercial properties along the corridor the over the years. Development in the City in recent years reflects the strong sub-regional market conditions for residential and commercial development but also the constraints associated with limited available development sites.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Development activity including recent construction, approved projects and projects in the approval process in the City reflect strong sub-regional housing market conditions.
		3	General Market Conditions		0.00	0.00	0.00	General market conditions for residential development in Mountain View presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Site assembly costs may create feasibility challenges for multifamily and mixed use development throughout the forecast.
		5	Parcel size and configuration		0.10	0.10	0.20	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.00	Design and capacity (multi-modal) improvements along El Camino Real required.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	City is updating and expanding its financing sources including utility charges and impact fees to help pay for needed infrastructure
		3	PDA financing capacity		0.00	0.00	0.00	New development will provide substantial infrastructure financing capacity

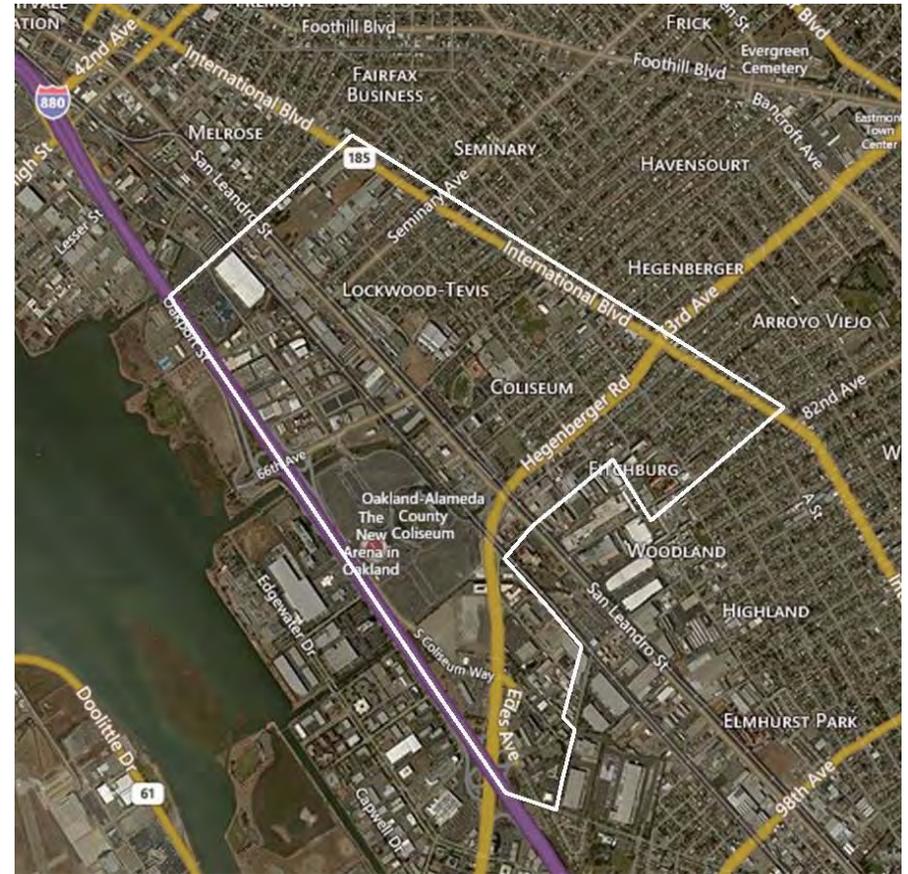
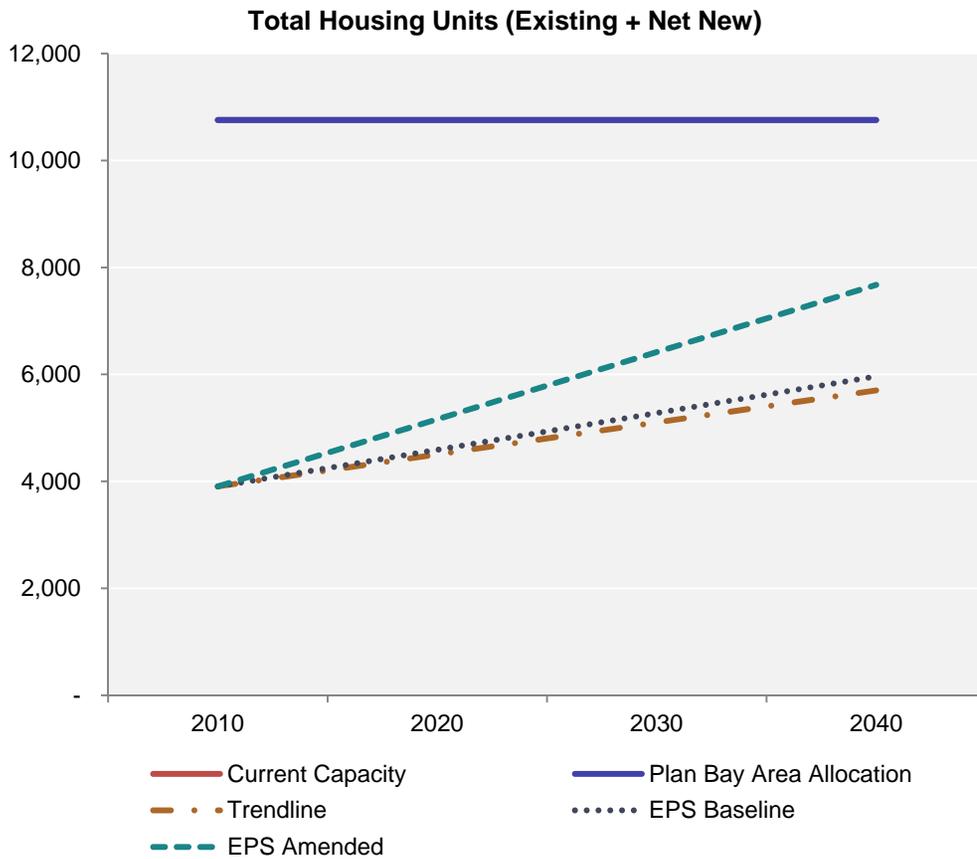
**Table A-25. Mountain View: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	2,660				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation			1,960		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	700				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,660	2,660	2,660	
		6	Sum of Capacity Constraint Coefficients		0.50	0.15	0.00	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.40	0.15	0.00			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.10	0.00	0.00			
7	EPS estimate of housing production given constraints		1,330	2,261	2,660			
8	Percentage of PDA 2040 housing allocation accommodated		67.9%	115.4%	135.7%			
Summary				Opportunity sites along the El Camino Corridor in Mountain View create substantial capacity for residential and mixed use development, despite constraints including shallow parcel depths and viable existing uses. <b>Efforts to assemble parcels and promote mixed uses prove successful.</b>				

**Table A-25. Mountain View: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Precise Plan adopted for the El Camino Corridor. Program level EIR completed.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by recent project approvals and plan adoptions.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.35	0.15	0.00	Development in the El Camino Corridor PDA has been constrained by its existing commercial uses; there has been continued revitalization of commercial properties along the corridor the over the years. Development in the City in recent years reflects the strong sub-regional market conditions for residential and commercial development but also the constraints associated with limited available development sites.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Development activity including recent construction, approved projects and projects in the approval process in the City reflect strong sub-regional housing market conditions.	
		3	General Market Conditions	0.00	0.00	0.00	General market conditions for residential development in Mountain View presently strong as the area benefits from proximity to the growing and dynamic Silicon Valley labor market.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Site assembly costs may create feasibility challenges for multifamily and mixed use development throughout the forecast.	
		5	Parcel size and configuration	0.05	0.00	0.00	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <b>Efforts to assemble parcels and promote mixed uses prove successful.</b>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.00	0.00	Design and capacity (multi-modal) improvements along El Camino Real required.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.00	0.00	City is updating and expanding its financing sources including utility charges and impact fees to help pay for needed infrastructure	
		3	PDA financing capacity	0.00	0.00	0.00	New development will provide substantial infrastructure financing capacity	

# Oakland: Coliseum BART Station Area



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
6,850	6,850	2,055	30%	Modest achievable pricing, infrastructure needs, and great uncertainty	3,768	55%	External infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,850				Coliseum City EIR project description includes 6,370 units, and additional units may be built elsewhere in the Coliseum PDA.
		2	<i>Plan Bay Area</i> new housing allocation				6,850	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recent planning has significantly increased allowance for residential development, and market pressure is not expected to seek additional density in the planning horizon.
		5	Estimated gross housing capacity at each period		6,850	6,850	6,850	
		6	Sum of Capacity Constraint Coefficients		0.95	0.85	0.70	Little evidence of market-supported development in this area, persistent deterrents to market attraction, and infrastructure capacity/funding issues.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.60	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.25	0.25	
		7	EPS estimate of housing production given constraints		343	1,028	2,055	
		8	Percentage of PDA 2040 housing allocation accommodated		5.0%	15.0%	30.0%	
			<b>Summary</b>	The Coliseum PDA has had virtually no market-rate housing development for decades, though affordable housing has been expanded in the area. Projects currently contemplated require subsidy that is scarce, and the Coliseum City project is ambitious but uncertain in many respects, including market acceptance and infrastructure financing/burdens as well as whether any or all of the sports teams will remain in the project. Despite considerable planning by the City and engagement with potential developers, this PDA has many uncertainties that warrant a deep discount in projecting achievable units through 2040.				

**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	PDA is guided by Coliseum Redevelopment Plan (1995) and Coliseum City Specific Plan/EIR (2015)	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Significant underutilized sites exist, including sports complex site and BART property.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City elected officials support development in this area, including densification, as evinced by recent plan approval and apparent willingness to subsidize some development.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Community has generally supported new development in this area, including intensification of affordable housing. Some growing sentiment of concern regarding gentrification throughout City, though little evidence of such effects yet in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.35</b>	<b>0.25</b>	<b>0.15</b>	City reports 200 units built in this PDA since 2010, well below the pace required to reach housing allocation. Most or all new housing in this area has been subsidized affordable development, not market-rate. Though a developer has been engaged in the planning efforts for Coliseum City, no commitments have yet been made for infrastructure or vertical construction that would represent a clear signal of investment.	
		2	Recent Local Development Activity (pipeline)	<b>0.05</b>	0.00	0.00	City identifies 116 units in the pipeline, representing a market-rate project on BART property that is seeking subsidy.	
		3	General Market Conditions	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Low income levels, low housing prices, and limited recent development of market-rate housing indicate market challenges.	
		4	Financial Feasibility Constraint	<b>0.15</b>	<b>0.15</b>	<b>0.15</b>	Observable market-rate price points in this area are well below levels required for new construction feasibility, and major market shift or subsidy likely to be required for much new development.	

**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Ample.
		6	Existence of major investment disincentives		<b>0.10</b>	<b>0.10</b>	<b>0.05</b>	2010 survey completed by City identified poverty, crime, and low quality schools as major deterrents, in addition to industrial nature of the area. All three sports teams have indicated interest in leaving Oakland in recent years, though baseball lease extend into ~2024, curbing the developability of the site for housing for an extended period. EPS score assumes these situations modestly improve over time.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		<b>0.10</b>	<b>0.15</b>	<b>0.15</b>	City has preliminarily identified major infrastructure needs for the area, most of which don't have funding in place. EPS score assumes some early development can occur with limited improvements, while additional later development triggers greater need.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		<b>0.05</b>	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures. For this project, various funding mechanisms are being explored, including Infrastructure Financing Districts, but no commitments have yet been made and the County's participation (required as part of the land-owning JPA) is not certain.
		3	PDA financing capacity		<b>0.05</b>	<b>0.10</b>	<b>0.10</b>	Redevelopment loss is an extreme challenge for this area. Vertical development has very difficult challenge with feasibility even without infrastructure burden.

**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,850				Coliseum City EIR project description includes 6,370 units, and additional units may be built elsewhere in the Coliseum PDA.
		2	<i>Plan Bay Area</i> new housing allocation			6,850		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recent planning has significantly increased allowance for residential development, and market pressure is not expected to seek additional density in the planning horizon.
		5	Estimated gross housing capacity at each period		6,850	6,850	6,850	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.45	Little evidence of market-supported development in this area, persistent deterrents to market attraction, and infrastructure capacity/funding issues.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.60	0.45	
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.10	0.00			
7	EPS estimate of housing production given constraints		343	2,055	3,768			
8	Percentage of PDA 2040 housing allocation accommodated		5.0%	30.0%	55.0%			
	<b>Summary</b>	<p>The Coliseum PDA has had virtually no market-rate housing development for decades, though affordable housing has been expanded in the area. Projects currently contemplated require subsidy that is scarce, and the Coliseum City project is ambitious but uncertain in many respects, including market acceptance and infrastructure financing/burdens as well as whether any or all of the sports teams will remain in the project. Despite considerable planning by the City and engagement with potential developers, this PDA has many uncertainties that warrant a deep discount in projecting achievable units through 2040.</p> <p style="color: red;">Amended scenario assumes infrastructure financing is provided by external sources.</p>						

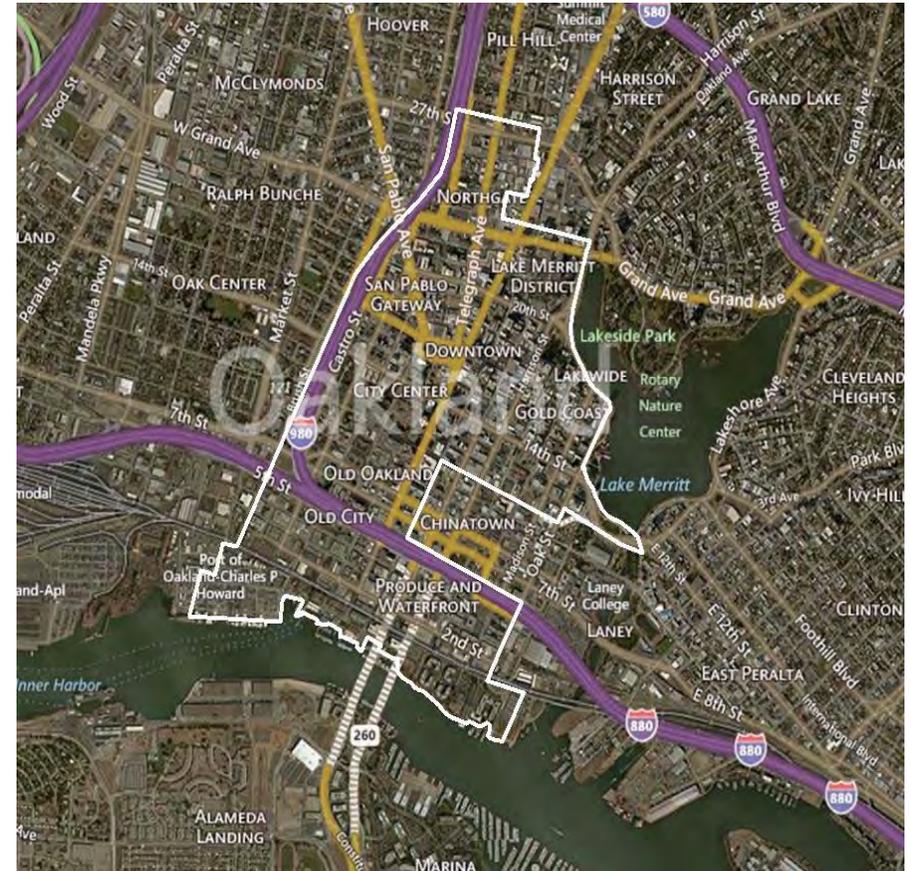
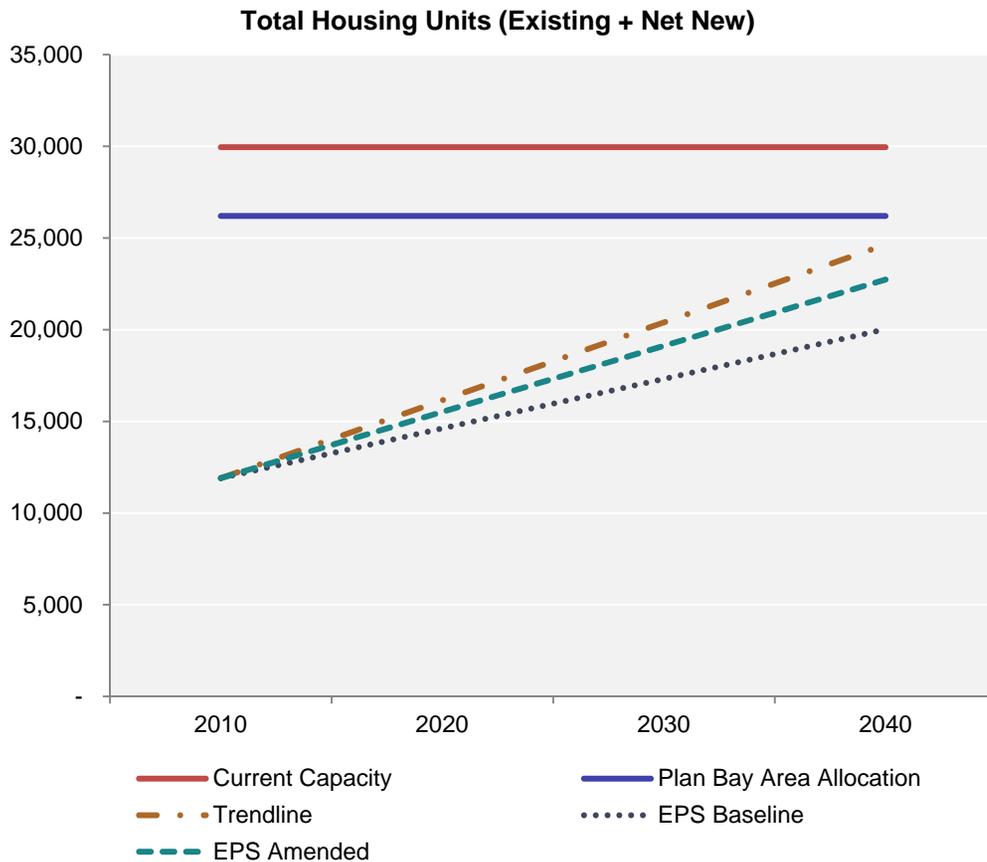
**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	PDA is guided by Coliseum Redevelopment Plan (1995) and Coliseum City Specific Plan/EIR (2015)
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Significant underutilized sites exist, including sports complex site and BART property.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City elected officials support development in this area, including densification, as evinced by recent plan approval and apparent willingness to subsidize some development.
		2	History of neighborhood opposition		0.00	0.00	0.00	Community has generally supported new development in this area, including intensification of affordable housing. Some growing sentiment of concern regarding gentrification throughout City, though little evidence of such effects yet in this PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.35</b>	<b>0.25</b>	<b>0.15</b>	City reports 200 units built in this PDA since 2010, well below the pace required to reach housing allocation. Most or all new housing in this area has been subsidized affordable development, not market-rate. Though a developer has been engaged in the planning efforts for Coliseum City, no commitments have yet been made for infrastructure or vertical construction that would represent a clear signal of investment.
		2	Recent Local Development Activity (pipeline)		<b>0.05</b>	0.00	0.00	City identifies 116 units in the pipeline, representing a market-rate project on BART property that is seeking subsidy.
		3	General Market Conditions		<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Low income levels, low housing prices, and limited recent development of market-rate housing indicate market challenges.
		4	Financial Feasibility Constraint		<b>0.15</b>	<b>0.15</b>	<b>0.15</b>	Observable market-rate price points in this area are well below levels required for new construction feasibility, and major market shift or subsidy likely to be required for much new development.
		5	Parcel size and configuration		0.00	0.00	0.00	Ample.
		6	Existence of major investment disincentives		<b>0.10</b>	<b>0.10</b>	<b>0.05</b>	2010 survey completed by City identified poverty, crime, and low quality schools as major deterrents, in addition to industrial nature of the area. All three sports teams have indicated interest in leaving Oakland in recent years, though baseball lease extend into ~2024, curbing the developability of the site for housing for an extended period. EPS score assumes these situations modestly improve over time.

**Table A-26. Oakland: Coliseum BART Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		<b>0.10</b>	<b>0.05</b>	0.00	<p>City has preliminarily identified major infrastructure needs for the area, most of which don't have funding in place.</p> <p><i>Amended scenario assumes external funding is secured for infrastructure improvements.</i></p>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		<b>0.05</b>	0.00	0.00	<p>Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures. For this project, various funding mechanisms are being explored, including Infrastructure Financing Districts, but no commitments have yet been made and the County's participation (required as part of the land-owning JPA) is not certain.</p>
		3	PDA financing capacity		<b>0.05</b>	<b>0.05</b>	0.00	<p>Redevelopment loss is an extreme challenge for this area. Vertical development has very difficult challenge with feasibility even without infrastructure burden.</p> <p><i>Amended scenario assumes external funding is secured for infrastructure improvements.</i></p>

# Oakland: Downtown & Jack London Square



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
14,290	18,045	8,120	57%	Site availability and reliance on Type I construction	10,827	76%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	18,045				CD+A identified 41 acres of opportunities sites, which could accommodate over 18,000 units if built to maximum allowable density.
		2	<i>Plan Bay Area</i> new housing allocation				14,290	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	3,755				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		18,045	18,045	18,045	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.55	Primary issues are development feasibility and ability to carry infrastructure burden.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.60	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.10	
		7	EPS estimate of housing production given constraints		1,805	5,414	8,120	
		8	Percentage of PDA 2040 housing allocation accommodated		12.6%	37.9%	56.8%	
			Summary	Downtown Oakland has had a significant expansion of its housing base over the past decade-plus, and a substantial development pipeline exists. Aggregate site capacity appears to be ample even under existing zoning, and the City is commencing a Specific Plan process that should clarify and streamline development opportunities. The infrastructure is generally in place, though improvements may be desired as part of the revamping of Downtown. The primary constraint is the cyclical nature of demand and lower achievable price points than in other very urban environments (San Francisco), which limit construction feasibility. Estimated achievement through 2040 is somewhat slower pace than achieved 2000-2010, but reflects expectation that sites will become more challenging over time and that subsidies for market-rate development will be scarce. Projected growth assumes density averages 200 units/acre, well below maximum currently allowed on opportunity sites.				

**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Starting a Downtown Specific Plan and EIR process in mid-2015, which should be complete by 2017. Currently prevailing documents date back to Central District Redevelopment Plan (1969) which has been updated as recently as 2012.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Not required or counted as existing capacity as opportunity sites, but some lower-value property owners may choose to redevelop.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Downtown Oakland has had significant gains in residential development in the past decades, including former Mayor Brown's "10K" program and continuing through present with approvals for numerous housing proposals.	
		2	History of neighborhood opposition	0.05	0.00	0.00	While there was widespread support for the 10K program, there is some growing concern among advocates regarding gentrification.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.30	0.15	City reports that Downtown PDA has added 527 units since 2010, and projects under the "10K" initiative added roughly 4500 units between 2000-2010. This suggests average absorption of roughly 300 units/year over a 15-year timeframe, somewhat less than required to reach PDA housing allocations.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City identifies 3,348 units in the pipeline for this PDA as of 2015, a substantial proportion of the allocation.	
		3	General Market Conditions	0.00	0.00	0.00	Apartment rents have increased substantially following the recession, job growth is expected (including more tech jobs), and Downtown's amenities and nightlife have improved dramatically in recent years.	
		4	Financial Feasibility Constraint	0.20	0.20	0.20	High cost of construction for mid- and high-rise products pose a challenge despite recent gains in achievable rents. Most feasible products are woodframe, which would be at lower densities than required to reach allocation.	
		5	Parcel size and configuration	0.00	0.05	0.10	As in any urban infill situation, expect the most developable sites to be used first leaving more challenging sites for later development.	

**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		0.05	0.05	0.00	Despite major gains and improvements, some issues of crime and sporadic civil unrest persist in Downtown Oakland. Discounting assumes these issues diminish as more housing and employment uses are added over time.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	City believes most infrastructure capacity is adequate for servicing new development, although "complete streets" improvements would enhance usability and marketability of Downtown.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.
		3	PDA financing capacity		0.05	0.05	0.05	Marginal feasibility indicates that new construction cannot shoulder a great burden for infrastructure financing, so external funding sources may be required.

**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	18,045				CD+A identified 41 acres of opportunities sites, which could accommodate over 18,000 units if built to maximum allowable density.
		2	<i>Plan Bay Area</i> new housing allocation				14,290	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	3,755				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		18,045	18,045	18,045	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.40	Primary issues are development feasibility and ability to carry infrastructure burden.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.60	0.35	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.05	
		7	EPS estimate of housing production given constraints		1,805	5,414	10,827	
		8	Percentage of PDA 2040 housing allocation accommodated		12.6%	37.9%	75.8%	
		Summary		<p>Downtown Oakland has had a significant expansion of its housing base over the past decade-plus, and a substantial development pipeline exists. Aggregate site capacity appears to be ample even under existing zoning, and the City is commencing a Specific Plan process that should clarify and streamline development opportunities. The infrastructure is generally in place, though improvements may be desired as part of the revamping of Downtown. The primary constraint is the cyclical nature of demand and lower achievable price points than in other very urban environments (San Francisco), which limit construction feasibility. Estimated achievement through 2040 is somewhat slower pace than achieved 2000-2010, but reflects expectation that sites will become more challenging over time and that subsidies for market-rate development will be scarce.</p> <p><b>Amended scenario assumes external funding for infrastructure is secured, and parcel assembly tools are available and effective. Amended growth assumes density averages 250 units/acre, still well below maximum currently allowed on opportunity sites.</b></p>				

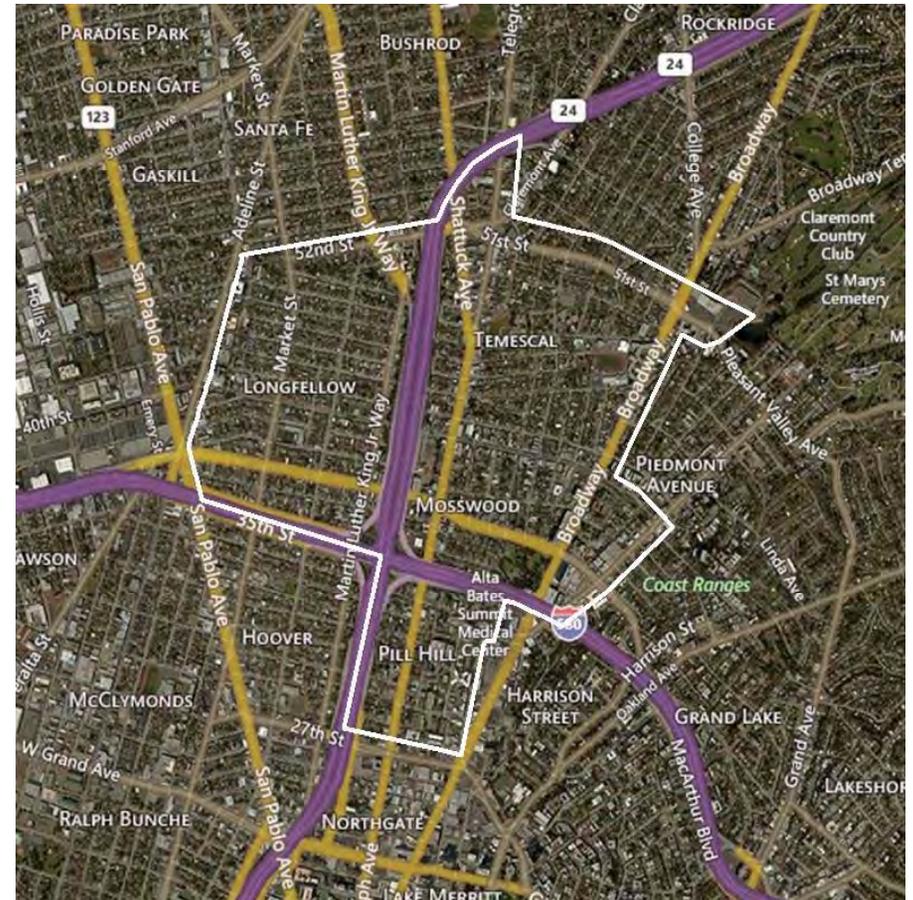
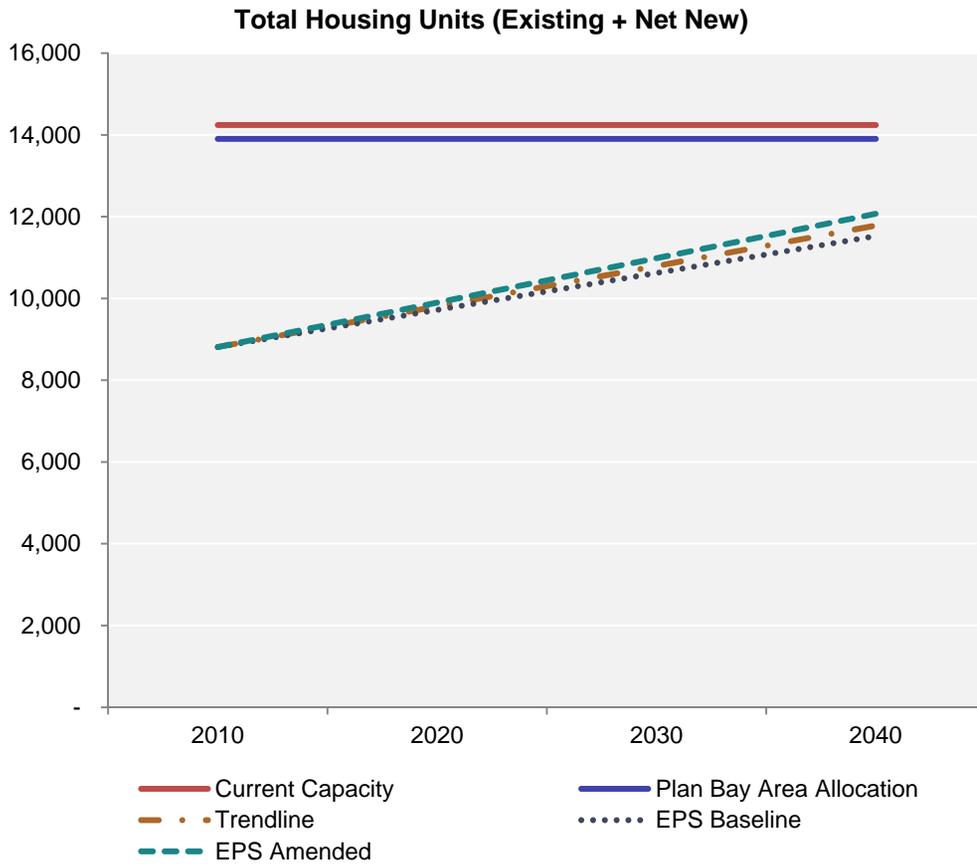
**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Starting a Downtown Specific Plan and EIR process in mid-2015, which should be complete by 2017. Currently prevailing documents date back to Central District Redevelopment Plan (1969) which has been updated as recently as 2012.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Not required or counted as existing capacity as opportunity sites, but some lower-value property owners may choose to redevelop.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Downtown Oakland has had significant gains in residential development in the past decades, including former Mayor Brown's "10K" program and continuing through present with approvals for numerous housing proposals.	
		2	History of neighborhood opposition	0.05	0.00	0.00	While there was widespread support for the 10K program, there is some growing concern among advocates regarding gentrification.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.45	0.30	0.15	City reports that Downtown PDA has added 527 units since 2010, and projects under the "10K" initiative added roughly 4500 units between 2000-2010. This suggests average absorption of roughly 300 units/year over a 15-year timeframe, somewhat less than required to reach PDA housing allocations.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City identifies 3,348 units in the pipeline for this PDA as of 2015, a substantial proportion of the allocation.	
		3	General Market Conditions	0.00	0.00	0.00	Apartment rents have increased substantially following the recession, job growth is expected (including more tech jobs), and Downtown's amenities and nightlife have improved dramatically in recent years.	
		4	Financial Feasibility Constraint	0.20	0.20	0.20	High cost of construction for mid- and high-rise products pose a challenge despite recent gains in achievable rents. Most feasible products are woodframe, which would be at lower densities than required to reach allocation.	
		5	Parcel size and configuration	0.00	0.05	0.00	As in any urban infill situation, expect the most developable sites to be used first leaving more challenging sites for later development.  <b>Amended scenario assumes property acquisition/assembly tools are restored.</b>	
		6	Existence of major investment disincentives	0.05	0.05	0.00	Despite major gains and improvements, some issues of crime and sporadic civil unrest persist in Downtown Oakland. Discounting assumes these issues diminish as more housing and employment uses are added over time.	

**Table A-27. Oakland: Downtown & Jack London Square**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.05	0.05	0.05	<p>City believes most infrastructure capacity is adequate for servicing new development, although "complete streets" improvements would enhance usability and marketability of Downtown.</p> <p><b>Amended scenario assumes external infrastructure funding is consistently secured.</b></p>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	<p>Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.</p>
		3	PDA financing capacity		0.05	0.05	0.00	<p>Marginal feasibility indicates that new construction cannot shoulder a great burden for infrastructure financing, so external funding sources may be required.</p> <p><b>Amended scenario assumes external infrastructure funding is consistently secured.</b></p>

# Oakland: MacArthur Transit Village



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
5,090	5,428	2,714	53%	Marginal feasibility and infill parcelization	3,257	64%	Parcel assembly tools

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,428				CD+A identified 45 acres of underutilized sites that could achieve 5,428 DUs at average of 120 DU/acre. Number is higher than City's estimate from Housing Element sites analysis.	
		2	<i>Plan Bay Area</i> new housing allocation				5,090	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	338					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		No upzoning assumed in Baseline scenario, as allowable densities are already relatively high.
		5	Estimated gross housing capacity at each period		5,428	5,428	5,428		
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.50		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.05	0.05	0.00		
	<i>Market and Investment Attractiveness</i>		0.70	0.60	0.50				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.00	0.00				
7	EPS estimate of housing production given constraints			1,086	1,900	2,714			
8	Percentage of PDA 2040 housing allocation accommodated			21.3%	37.3%	53.3%			
			<b>Summary</b>	This PDA has undergone piecemeal redevelopment in recent years, but a strong housing market and other recent improvements in the area make it among Oakland's most desirable neighborhoods. The BART Transit Village is underway, but market-rate development remains constrained by marginal feasibility (values vs. construction costs for dense projects), and site availability is likely to be an increasing issue over time.					

**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Broadway/MacArthur/San Pablo Plan and EIR adopted 2006
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	City believes figures should be achievable without redeveloping residential uses, though some such displacement may occur. Major opportunity site is MacArthur BART station land, planned for over 600 units.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has approved numerous multifamily projects in and around PDA in recent years, and generally promoting housing intensification.
		2	History of neighborhood opposition		<b>0.05</b>	<b>0.05</b>	0.00	Mixed feelings in neighborhood, with some concerns about aesthetics and traffic impacts in particular. Approved projects are frequently appealed, adding time.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.45</b>	<b>0.35</b>	<b>0.25</b>	City reports 378 units built in PDA from 2010-2015, including 288 market-rate and 90 affordable. This modest amount reflects market constraints including marginally feasible achievable price points. Achievement of PDA housing allocation will require roughly twice the rate of development as observed in recent years.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City identifies 1,206 new units in the pipeline, including numerous infill projects (50-100 units) in addition to Transit Village.
		3	General Market Conditions		0.00	0.00	0.00	Economically diverse PDA that has undergone significant but far-from-complete gentrification. Home values have escalated quickly, and area services and amenities have improved dramatically.
		4	Financial Feasibility Constraint		<b>0.15</b>	<b>0.15</b>	<b>0.15</b>	Though achievable home values and rents are reasonable and multifamily housing has been accepted and well-performing (rents and vacancies), virtually all new development in this corridor must occur on sites with existing uses and ongoing cash flow. Largest opportunity site is the MacArthur BART station property, planned for over 600 units. Eventual end of buildings' useful life will facilitate longer-term development, but achieving densities for allocation (roughly 120 du/acre) will face feasibility challenges.

**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	<b>0.05</b>	<b>0.10</b>	Few large parcels, but smaller infill projects have been pursued successfully. Discounting assumes the most developable sites will be used first.
		6	Existence of major investment disincentives		<b>0.10</b>	<b>0.05</b>	0.00	2010 survey identifies crime and schools as deterrents to market. Area's gentrification is likely to continue, potentially improving both of these disincentives.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Infrastructure upgrades believed to be relatively modest and typical of new infill development.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		<b>0.05</b>	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.
		3	PDA financing capacity		0.00	0.00	0.00	Infrastructure upgrades believed to be relatively modest and typical of new infill development.

**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,428				CD+A identified 45 acres of underutilized sites that could achieve 5,428 DUs at average of 120 DU/acre. Number is higher than City's estimate from Housing Element sites analysis.	
		2	<i>Plan Bay Area</i> new housing allocation				5,090	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	338					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		No upzoning assumed in Baseline scenario, as allowable densities are already relatively high.
		5	Estimated gross housing capacity at each period		5,428	5,428	5,428		
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.40		Redevelopment of existing uses represents a major challenge in this area, but history shows this will occur over time.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.05	0.05	0.00		
	<i>Market and Investment Attractiveness</i>		0.70	0.60	0.40				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.00	0.00				
7	EPS estimate of housing production given constraints		1,086	1,900	3,257				
8	Percentage of PDA 2040 housing allocation accommodated		21.3%	37.3%	64.0%				
		Summary	<p>This PDA has undergone piecemeal redevelopment in recent years, but a strong housing market and other recent improvements in the area make it among Oakland's most desirable neighborhoods. The BART Transit Village is underway, but market-rate development remains constrained by marginal feasibility (values vs. construction costs for dense projects), and site availability is likely to be an increasing issue over time.</p> <p><b>Amended scenario assumes site assembly tools facilitate more development than otherwise achievable, and resulting growth projection assumes average of roughly 75 du/acre on opportunity sites.</b></p>						

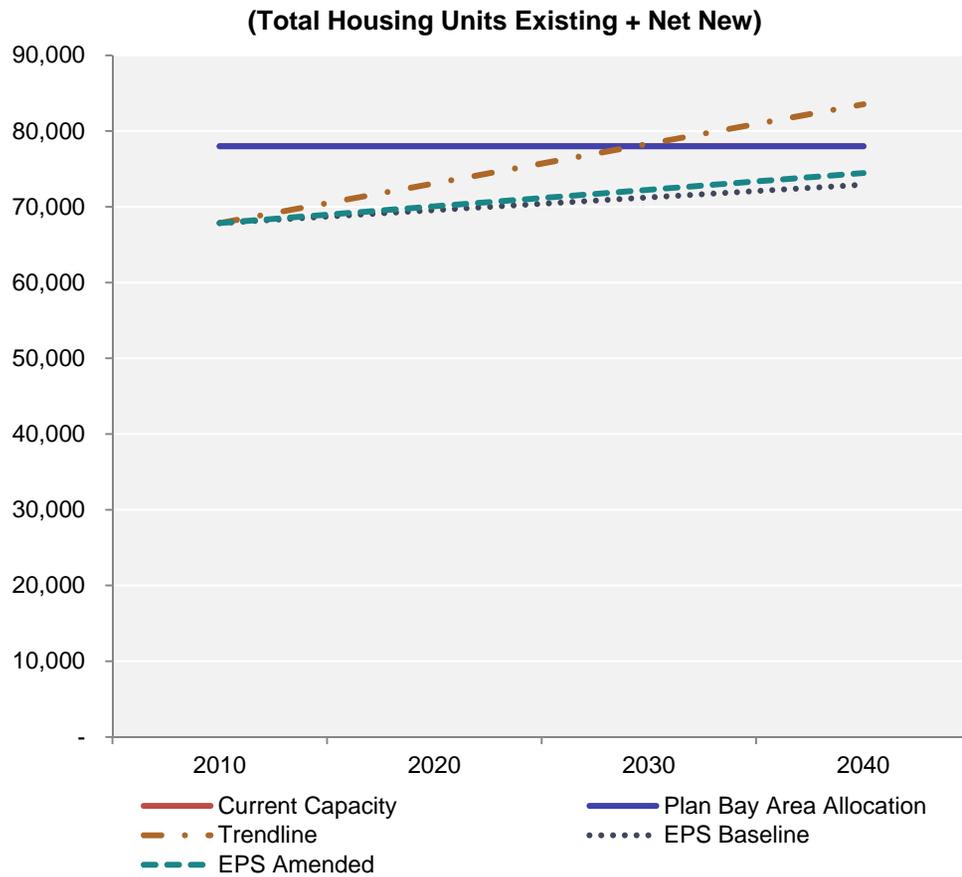
**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Broadway/MacArthur/San Pablo Plan and EIR adopted 2006	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	City believes figures should be achievable without redeveloping residential uses, though some such displacement may occur. Major opportunity site is MacArthur BART station land, planned for over 600 units.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has approved numerous multifamily projects in and around PDA in recent years, and generally promoting housing intensification.	
		2	History of neighborhood opposition	<b>0.05</b>	<b>0.05</b>	0.00	Mixed feelings in neighborhood, with some concerns about aesthetics and traffic impacts in particular. Approved projects are frequently appealed, adding time.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.45</b>	<b>0.35</b>	<b>0.25</b>	City reports 378 units built in PDA from 2010-2015, including 288 market-rate and 90 affordable. This modest amount reflects market constraints including marginally feasible achievable price points. Achievement of PDA housing allocation will require roughly twice the rate of development as observed in recent years.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City identifies 1,206 new units in the pipeline, including numerous infill projects (50-100 units) in addition to Transit Village.	
		3	General Market Conditions	0.00	0.00	0.00	Economically diverse PDA that has undergone significant but far-from-complete gentrification. Home values have escalated quickly, and area services and amenities have improved dramatically.	
		4	Financial Feasibility Constraint	<b>0.15</b>	<b>0.15</b>	<b>0.15</b>	Though achievable home values and rents are reasonable and multifamily housing has been accepted and well-performing (rents and vacancies), virtually all new development in this corridor must occur on sites with existing uses and ongoing cash flow. Largest opportunity site is the MacArthur BART station property, planned for over 600 units. Eventual end of buildings' useful life will facilitate longer-term development, but achieving densities for allocation (roughly 120 du/acre) will face feasibility challenges.	

**Table A-28. Oakland: MacArthur Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	<b>0.05</b>	0.00	Few large parcels, but smaller infill projects have been pursued successfully. Discounting assumes the most developable sites will be used first.  <i>Amended scenario assumes parcel assembly tools are restored.</i>	
		6	Existence of major investment disincentives	<b>0.10</b>	<b>0.05</b>	0.00	2010 survey identifies crime and schools as deterrents to market. Area's gentrification is likely to continue, potentially improving both of these disincentives.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Infrastructure upgrades believed to be relatively modest and typical of new infill development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	<b>0.05</b>	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.	
		3	PDA financing capacity	0.00	0.00	0.00	Infrastructure upgrades believed to be relatively modest and typical of new infill development.	

# Oakland: Transit Oriented Development Corridors



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
10,130	10,130	5,065	50%	Infill parcelization and modest pricing does not support higher density in many areas	6,585	65%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	10,130				City expressed expectation that at least the full 10,130 units could be accommodated under current plans. 1800 units in Broadway Valdez EIR, 4900 in Lake Merritt, 390 in Central Estuary, plus unspecified numbers throughout remainder of the City. More specific capacity accounting not provided due to geographic scale and diversity of this PDA, which includes most of the City.
		2	<i>Plan Bay Area</i> new housing allocation				10,130	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning capacity generally is not considered a constraint in this PDA.
		5	Estimated gross housing capacity at each period		10,130	10,130	10,130	
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	Generally supportive of new development at urban densities.
			<i>Community Support</i>		0.05	0.05	0.05	Some resistance based on different issues in different areas.
			<i>Market and Investment Attractiveness</i>		0.60	0.50	0.35	Economically diverse area with very different price points and issues by neighborhood.
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.10	City historically has relied on ad hoc contributions from projects and external funding sources.
		7	EPS estimate of housing production given constraints		2,026	3,546	5,065	
		8	Percentage of PDA 2040 housing allocation accommodated		20.0%	35.0%	50.0%	
		<b>Summary</b>		This PDA comprises the majority of the City of Oakland's land area, and faces diverse challenges across its many neighborhoods. Generally, Oakland has faced challenges achieving feasibility for new development due to modest projected price points, despite some very expensive and affluent neighborhoods. Site availability is also expected to be an increasing concern as more easily developed sites go first. Infrastructure financing has been inconsistent, and relied heavily on external funding.				

**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Several including Broadway-Valdez (2014), Central Estuary (2013) and Lake Merritt (2014), with associated EIRs that are between "program" and "project" levels.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	City does not anticipate that new development would require displacement of residential uses.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has generally supported new development, even in the face of some community opposition.
		2	History of neighborhood opposition		0.05	0.05	0.05	Varies by area. Focused on gentrification concerns in some neighborhoods, and more general traffic and typical "NIMBY" concerns in other areas.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.40	0.25	0.10	915 built 2010-2015. At this pace, this PDA would not achieve full allocation by 2040, but pace will likely accelerate due to recent adoption of several key plans.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	1351 in pipeline
		3	General Market Conditions		0.05	0.05	0.05	Oakland is economically diverse and achieves very different price points depending on neighborhood. The geographic breadth of this PDA makes it difficult to generalize, but some areas feature very different demographic and economic characteristics.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Varies by area, but persistent challenges for new higher-density development feasibility even in some of the stronger neighborhoods and even among lower-density product types in many areas.

**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration	0.00	0.05	0.05	Many of the developable sites throughout this area are smaller and/or feature existing uses. This scoring assumes the more easily developed sites will go first, and more difficult ones will be required in the future.	
		6	Existence of major investment disincentives	0.05	0.05	0.05	Geographically large PDA faces diverse problems that differ by area, but include blight, crime, and perceived school quality.	
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity	0.05	0.05	0.05	City believes most infrastructure capacity is adequate for servicing new development, although "complete streets" improvements would enhance usability and marketability of Downtown.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.	
		3	PDA financing capacity	0.05	0.05	0.05	Marginal feasibility indicates that new construction cannot shoulder a great burden for infrastructure financing, so external funding sources may be required.	

**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	10,130				City expressed expectation that at least the full 10,130 units could be accommodated under current plans. 1800 units in Broadway Valdez EIR, 4900 in Lake Merritt, 390 in Central Estuary, plus unspecified numbers throughout remainder of the City. More specific capacity accounting not provided due to geographic scale and diversity of this PDA, which includes most of the City.
		2	<i>Plan Bay Area</i> new housing allocation				10,130	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning capacity generally is not considered a constraint in this PDA.
		5	Estimated gross housing capacity at each period		10,130	10,130	10,130	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	Generally supportive of new development at urban densities.
			<i>Community Support</i>		0.05	0.05	0.05	Some resistance based on different issues in different areas.
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.30	Economically diverse area with very different price points and issues by neighborhood.
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.00	City historically has relied on ad hoc contributions from projects and external funding sources.
		7	EPS estimate of housing production given constraints		2,026	4,052	6,585	
		8	Percentage of PDA 2040 housing allocation accommodated		20.0%	40.0%	65.0%	
			Summary	This PDA comprises the majority of the City of Oakland's land area, and faces diverse challenges across its many neighborhoods. Generally, Oakland has faced challenges achieving feasibility for new development due to modest projected price points, despite some very expensive and affluent neighborhoods. Site availability is also expected to be an increasing concern as more easily developed sites go first. Infrastructure financing has been inconsistent, and relied heavily on external funding.				
				Amended scenario assumes external funding for infrastructure is consistent and adequate, and that parcel acquisition/assembly tools are available.				

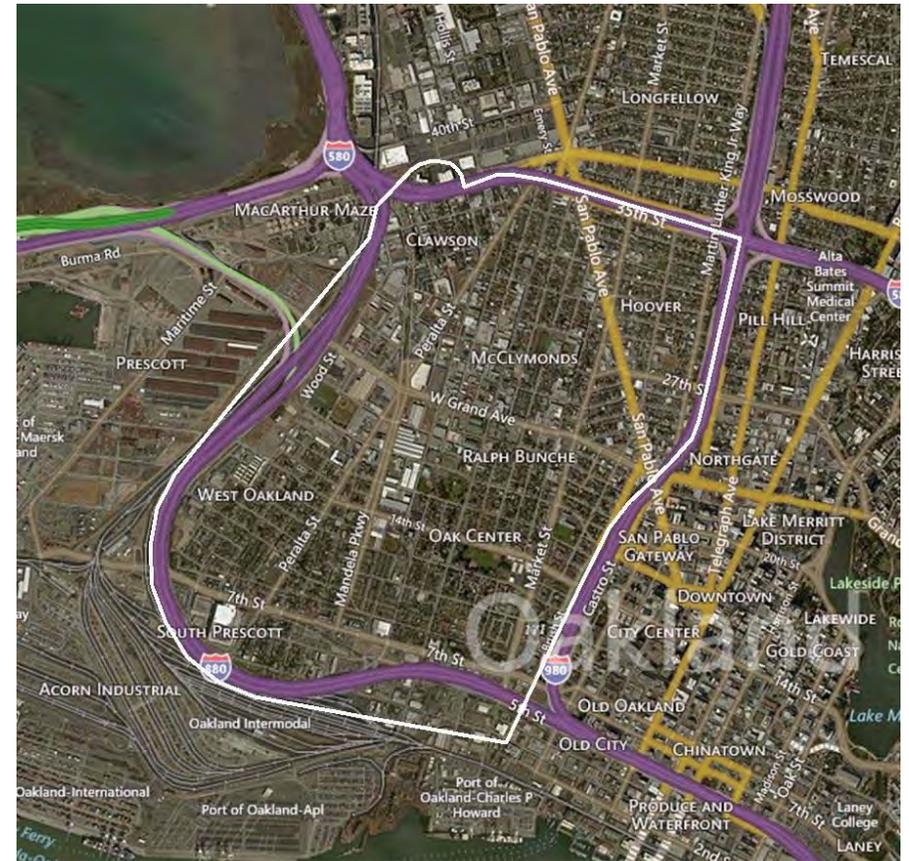
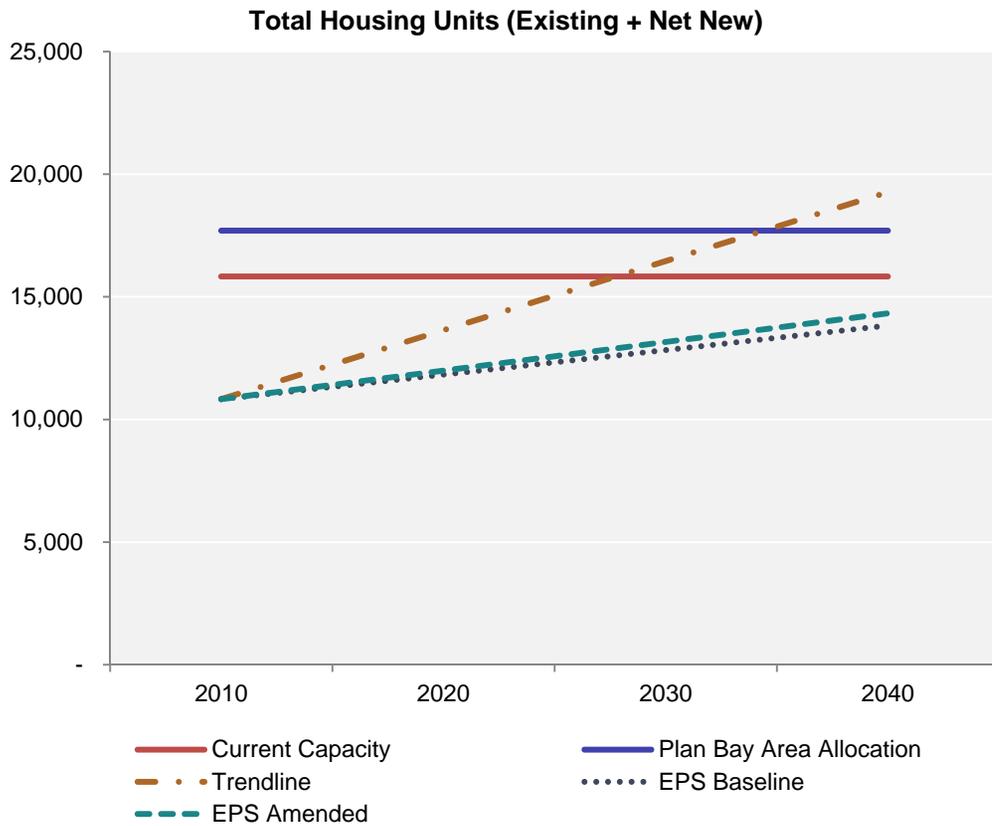
**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Several including Broadway-Valdez (2014), Central Estuary (2013) and Lake Merritt (2014), with associated EIRs that are between "program" and "project" levels.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	City does not anticipate that new development would require displacement of residential uses.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has generally supported new development, even in the face of some community opposition.	
		2	History of neighborhood opposition	0.05	0.05	0.05	Varies by area. Focused on gentrification concerns in some neighborhoods, and more general traffic and typical "NIMBY" concerns in other areas.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.40	0.25	0.10	915 built 2010-2015. At this pace, this PDA would not achieve full allocation by 2040, but pace will likely accelerate due to recent adoption of several key plans.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	1351 in pipeline	
		3	General Market Conditions	0.05	0.05	0.05	Oakland is economically diverse and achieves very different price points depending on neighborhood. The geographic breadth of this PDA makes it difficult to generalize, but some areas feature very different demographic and economic characteristics.	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Varies by area, but persistent challenges for new higher-density development feasibility even in some of the stronger neighborhoods and even among lower-density product types in many areas.	
		5	Parcel size and configuration	0.00	0.00	0.00	Many of the developable sites throughout this area are smaller and/or feature existing uses.  <i>Amended scenario assumes restoration of site acquisition and assembly tools.</i>	
		6	Existence of major investment disincentives	0.05	0.05	0.05	Geographically large PDA faces diverse problems that differ by area, but include blight, crime, and perceived school quality.	

**Table A-29. Oakland: Transit Oriented Development Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.05	0.05	0.00	<p>City believes most infrastructure capacity is adequate for servicing new development, although "complete streets" improvements would enhance usability and marketability of Downtown.</p> <p>Amended scenario assumes external funding is provided to address these issues.</p>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	<p>Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.</p>
		3	PDA financing capacity		0.05	0.05	0.00	<p>Marginal feasibility indicates that new construction cannot shoulder a great burden for infrastructure financing, so external funding sources may be required.</p> <p>Amended scenario assumes external funding is provided on a consistent and effective basis.</p>

# Oakland: West Oakland



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
6,870	5,000	3,000	44%	Marginal feasibility and infrastructure upgrades sought	3,500	51%	External infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,000				West Oakland Specific Plan project description includes up to 5,000 residential units. CD+A identified 93 acres of opportunity sites, requiring average density of roughly 55 units/acre to reach 5,000 unit capacity.
		2	<i>Plan Bay Area</i> new housing allocation				6,870	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,870)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		5,000	5,000	5,000	
		6	Sum of Capacity Constraint Coefficients		0.80	0.55	0.40	Market constraints include little history of successful development and marginal price points as well as some quality-of-life concerns.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.10	
		7	EPS estimate of housing production given constraints		1,000	2,250	3,000	
		8	Percentage of PDA 2040 housing allocation accommodated		14.6%	32.8%	43.7%	
		Summary		This PDA has undergone extensive planning, and has numerous policies in place to support housing intensification. However, the recent EIR for the area is for fewer units than allocated. Also, the area has not yet fully proven to be marketable to households able to pay prices that support new construction costs, though such trends are positive. Finally, infrastructure upgrades are desired to enhance the usability of this area -- especially streets and streetscape -- and the marginal project feasibility may not be able to support extensive cost burdens, thus requiring external funding sources.				

**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	West Oakland Specific Plan and EIR adopted 2014	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Not required to achieve plan buildout, but some lower-value property owners may choose to redevelop.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Specific Plan and EIR unanimously approved in 2014, encouraging higher density housing particularly around BART station.	
		2	History of neighborhood opposition	0.05	0.00	0.00	Concern expressed during planning about gentrification impacts.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.35	0.25	0.15	City reports 249 units constructed in PDA between 2010-2015. Pace can be expected to accelerate now that plan and EIR are complete.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City identifies 667 market-rate units in the pipeline as of 2015.	
		3	General Market Conditions	0.10	0.05	0.00	Modest income levels and home values in the neighborhood, but general upward trends in Oakland and this area's unique regional access advantages suggest future improvement.	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Achievable market-rate price points in this area are around levels required for new construction feasibility, as evinced by recent construction in area (90% market-rate between 2010-2015). But this area generally underperforms several other areas of Oakland also offering ample development opportunity. Feasibility challenge is modest however because product types required are generally woodframe rather than Type I.	

**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	Generally adequate for efficient construction.	
		6	Existence of major investment disincentives	0.05	0.05	0.05	Crime and school quality are perceived deterrents here, as are some nuisance and health concerns related to hazardous materials and mix of industrial and residential uses in and around this PDA.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.05	0.05	Primary infrastructure needs include significant upgrades to street and streetscape quality, which are in disrepair in many areas.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.	
		3	PDA financing capacity	0.05	0.05	0.05	Marginal housing values in this area may not be able to support much added cost for infrastructure, making grants and other monies more important than in some other PDAs.	

**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,000				West Oakland Specific Plan project description includes up to 5,000 residential units. CD+A identified 93 acres of opportunity sites, requiring average density of roughly 55 units/acre to reach 5,000 unit capacity.
		2	<i>Plan Bay Area</i> new housing allocation				6,870	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,870)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		5,000	5,000	5,000	
		6	Sum of Capacity Constraint Coefficients		0.80	0.55	0.30	Market constraints include little history of successful development and marginal price points as well as some quality-of-life concerns.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.00	
		7	EPS estimate of housing production given constraints		1,000	2,250	3,500	
		8	Percentage of PDA 2040 housing allocation accommodated		14.6%	32.8%	50.9%	
			Summary	This PDA has undergone extensive planning, and has numerous policies in place to support housing intensification. However, the recent EIR for the area is for fewer units than allocated. Also, the area has not yet fully proven to be marketable to households able to pay prices that support new construction costs, though such trends are positive. Finally, infrastructure upgrades are desired to enhance the usability of this area -- especially streets and streetscape -- and the marginal project feasibility may not be able to support extensive cost burdens, thus requiring external funding sources.				
				Amended scenario assumes external infrastructure funding sources are secured.				

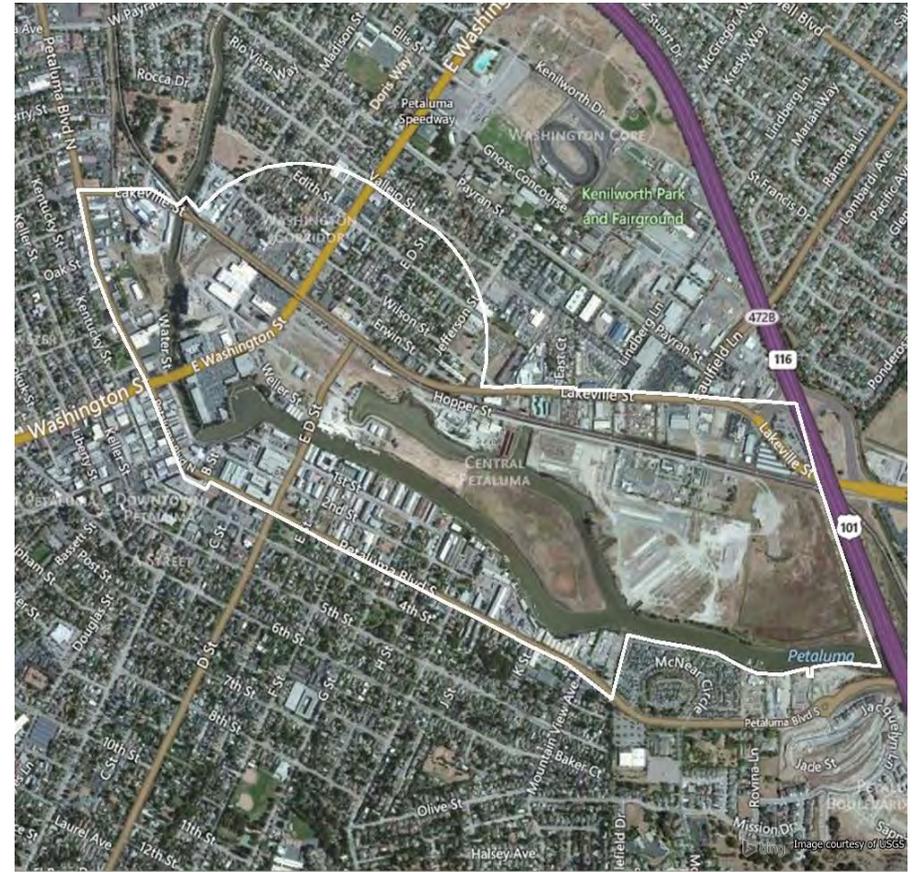
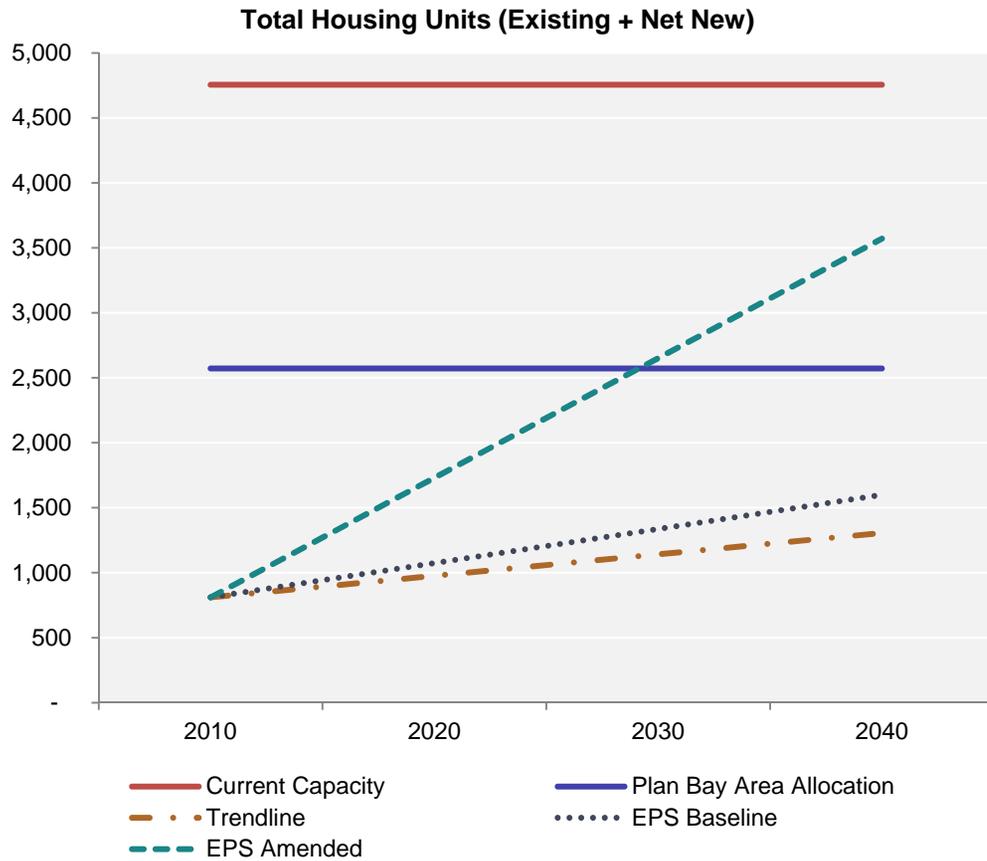
**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
B.	Planning and Entitlement Criteria	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	West Oakland Specific Plan and EIR adopted 2014	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Not required to achieve plan buildout, but some lower-value property owners may choose to redevelop.	
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Specific Plan and EIR unanimously approved in 2014, encouraging higher density housing particularly around BART station.	
		2	History of neighborhood opposition	0.05	0.00	0.00	Concern expressed during planning about gentrification impacts.	
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city	0.35	0.25	0.15	City reports 249 units constructed in PDA between 2010-2015. Pace can be expected to accelerate now that plan and EIR are complete.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City identifies 667 market-rate units in the pipeline as of 2015.	
		3	General Market Conditions	0.10	0.05	0.00	Modest income levels and home values in the neighborhood, but general upward trends in Oakland and this area's unique regional access advantages suggest future improvement.	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Achievable market-rate price points in this area are around levels required for new construction feasibility, as evinced by recent construction in area (90% market-rate between 2010-2015). But this area generally underperforms several other areas of Oakland also offering ample development opportunity. Feasibility challenge is modest however because product types required are generally woodframe rather than Type I.	
		5	Parcel size and configuration	0.00	0.00	0.00	Generally adequate for efficient construction.	

**Table A-30. Oakland: West Oakland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		0.05	0.05	0.05	Crime and school quality are perceived deterrents here, as are some nuisance and health concerns related to hazardous materials and mix of industrial and residential uses in and around this PDA.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.00	Primary infrastructure needs include significant upgrades to street and streetscape quality, which are in disrepair in many areas.  <i>Amended scenario assumes external funding addresses these capacity issues.</i>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	Oakland is exploring impact fees to fund infrastructure, as it only has sewer and jobs/housing fees today. Council typically opposes fees to be "business friendly," but then City often doesn't have resources to fund needed infrastructure. Projects contribute to local needs, but Citywide projects always funded by grants and bond measures.
		3	PDA financing capacity		0.05	0.05	0.00	Marginal housing values in this area may not be able to support much added cost for infrastructure, making grants and other monies more important than in some other PDAs.  <i>Amended scenario assumes external funding addresses these capacity issues.</i>

# Petaluma: Central, Turning Basin/Lower Reach



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,760	3,944	789	45%	Infrastructure capacity and funding	2,761	157%	External infrastructure financing and improved market conditions

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-31. Petaluma: Central, Turning Basin/Lower Reach**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,944				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,184				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,944	3,944	3,944	
		6	Sum of Capacity Constraint Coefficients		0.95	0.90	0.80	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.55	0.30	0.00			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.40	0.60	0.80			
7	EPS estimate of housing production given constraints		197	394	789			
8	Percentage of PDA 2040 housing allocation accommodated		11.2%	22.4%	44.8%			
	<b>Summary</b>	There are substantial opportunity sites in the Central Petaluma PDA and improving market conditions; however, major and costly infrastructure improvements will limit development in the area despite favorable planning policies and new transit access (SMART). Without a new bridge over the Petaluma River, much of the otherwise developable area will be extremely constrained in terms of accessibility.						

**Table A-31. Petaluma: Central, Turning Basin/Lower Reach**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan adopted in 2003 and new "form-based" code and Station Area Master Plan. Program EIR in place
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Plan adoption and related actions indicate strong political and public support for development in the area.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.25	0.10	0.00	Limited residential development in Petaluma during post-Recession period, primarily a land supply and capacity issue. Improving economy and resolving infrastructure limitations will improve market conditions during the forecast period.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Limited development thus far; several projects in the approval stage.
		3	General Market Conditions		0.10	0.10	0.00	Market conditions in Petaluma have rebounded in Petaluma during post-Recession period better than other Sonoma County communities and are expected to improve during the forecast period
		4	Financial Feasibility Constraint		0.20	0.10	0.00	Site-related constraints (infrastructure costs, 404(b)(1) permitting, etc.) are expected to create feasibility constraints in the near and mid-term. These will diminish as pricing continues to improve.
		5	Parcel size and configuration		0.00	0.00	0.00	
		6	Existence of major investment disincentives		0.00	0.00	0.00	No.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.20	0.30	0.40	Existing wet utility infrastructure in the area very aged and requires upgrading and replacement. Lack of capacity on the existing Petaluma River bridges limits access and creates congestion in the area
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.10	0.10	No comprehensive financing plan for the area has been prepared
		3	PDA financing capacity		0.10	0.20	0.30	Cost of needed infrastructure may exceed financing capacity in the near to mid-term. Need for external funding sources.

**Table A-31. Petaluma: Central, Turning Basin/Lower Reach**

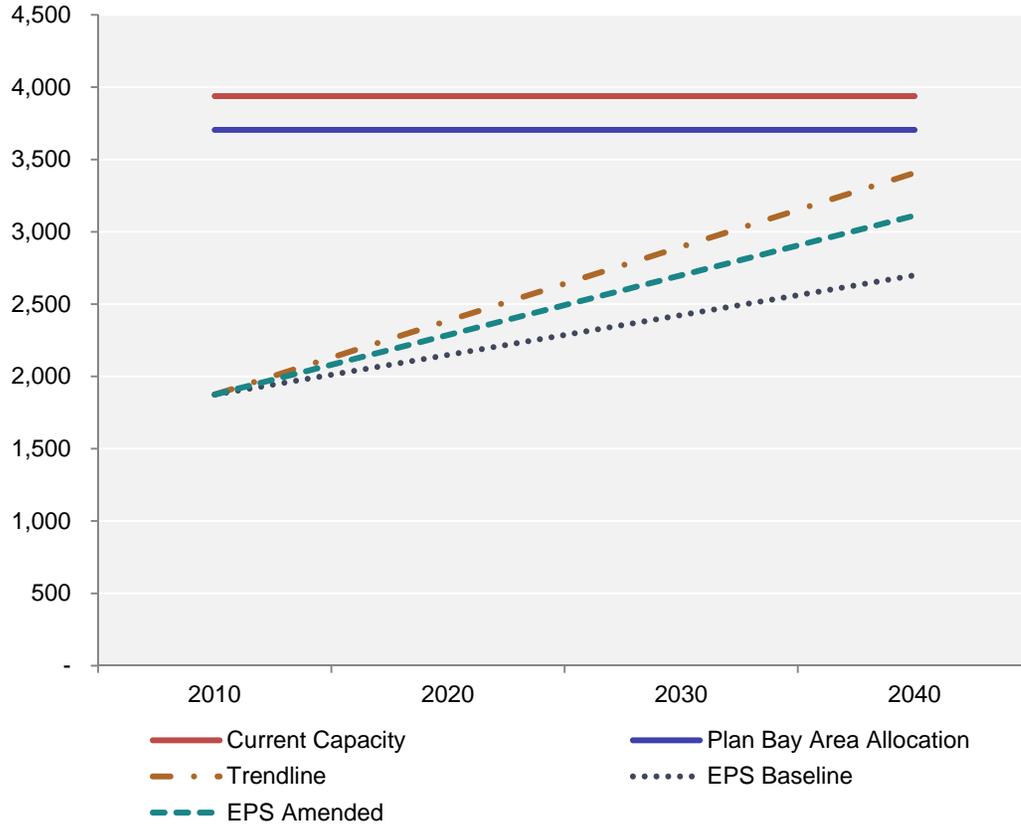
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,944				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,184				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,944	3,944	3,944	
		6	Sum of Capacity Constraint Coefficients		0.95	0.65	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.30	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.40	0.35	0.30	
		7	EPS estimate of housing production given constraints		197	1,380	2,761	
		8	Percentage of PDA 2040 housing allocation accommodated		11.2%	78.4%	156.9%	
		Summary		<p>There are substantial opportunity sites in the Central Petaluma PDA and improving market conditions; however, major and costly infrastructure improvements will limit development in the area despite favorable planning policies and new transit access (SMART). Without a new bridge over the Petaluma River, much of the otherwise developable area will be extremely constrained in terms of accessibility.</p> <p><b>Infrastructure financing plan is crafted and external funding becomes available for needed transportation system improvements (additional Petaluma River Bridge, etc.), thereby opening up access to substantial opportunity sites that greatly increase the potential housing yield from this PDA.</b></p>				

**Table A-31. Petaluma: Central, Turning Basin/Lower Reach**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan adopted in 2003 and new "form-based" code and Station Area Master Plan. Program EIR in place	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Plan adoption and related actions indicate strong political and public support for development in the area.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.25	0.10	0.00	Limited residential development in Petaluma during post-Recession period, primarily a land supply and capacity issue. Improving economy and resolving infrastructure limitations will improve market conditions during the forecast period.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Limited development thus far; several projects in the approval stage.	
		3	General Market Conditions	0.10	0.10	0.00	Market conditions in Petaluma have rebounded in Petaluma during post-Recession period better than other Sonoma County communities and are expected to improve during the forecast period	
		4	Financial Feasibility Constraint	0.20	0.10	0.00	Site-related constraints (infrastructure costs, 404(b)(1) permitting, etc.) are expected to create feasibility constraints in the near and mid-term. These will diminish as pricing continues to improve.	
		5	Parcel size and configuration	0.00	0.00	0.00		
		6	Existence of major investment disincentives	0.00	0.00	0.00	No.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.20	0.20	0.20	Existing wet utility infrastructure in the area very aged and requires upgrading and replacement. Lack of capacity on the existing Petaluma River bridges limits access and creates congestion in the area.  <i>Amended assumes these upgrades occur over time.</i>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	No comprehensive financing plan for the area has been prepared.  <i>Amended assumes such a financing plan would be prepared.</i>	
		3	PDA financing capacity	0.10	0.10	0.10	Cost of needed infrastructure may exceed financing capacity in the near to mid-term. Need for external funding sources.  <i>External funding becomes available for needed transportation system improvements (additional Petaluma River Bridge, etc.)</i>	

# Pittsburg: Downtown

Total Housing Units (Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,830	2,064	826	45%	Modest pricing and infill parcelization	1,238	68%	Improve infrastructure financing strategy

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-32. Pittsburg: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	2,064				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				1,830	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	234					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		2,064	2,064	2,064		
		6	Sum of Capacity Constraint Coefficients			0.85	0.70	0.55	
			<i>Planning and Entitlement Criteria</i>			0.05	0.00	0.00	
			<i>Community Support</i>			0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>			0.65	0.55	0.40			
	<i>Infrastructure Capacity, Needs, and Financing</i>			0.15	0.15	0.15			
7	EPS estimate of housing production given constraints			310	619	929			
8	Percentage of PDA 2040 housing allocation accommodated			16.9%	33.8%	50.8%			
		Summary	Limited opportunity sites in the Downtown PDA market conditions currently and will continue to limit realization of the PDA housing allocation. There are also the need to revitalize the downtown as a place people want to visit that limit development in this area.						

**Table A-32. Pittsburg: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.05	0.00	0.00	General Plan and existing zoning regulations. EIR on General Plan	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Some potential for displacement (replacement) of existing lower density residential uses	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.40	0.25	0.00	Very limited residential development in recent post-Recession period; prior to that Pittsburg dominated by single family and attached single family development. Conditions expected to improve during forecast period.	
		2	Recent Local Development Activity (pipeline)	0.05	0.00	0.00	Some ongoing renovation and remodeling only.	
		3	General Market Conditions	0.10	0.10	0.10	The lack of vitality in the downtown and related commercial or institutional attractions create a disincentive for multifamily development in the area	
		4	Financial Feasibility Constraint	0.10	0.10	0.10	Demand and pricing for mixed use/multifamily residential development remain weak in Pittsburg; pricing and competitive (with single family and attached single family development)	
		5	Parcel size and configuration	0.00	0.10	0.20	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00		
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure has capacity to accommodate planned development capacity; some site-related and utility improvements will be required.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.05	0.05	No.	
		3	PDA financing capacity	0.10	0.10	0.10	Financing capacity will be limited by lack of investment in the coming years and over time by the need for additional infrastructure investments.	

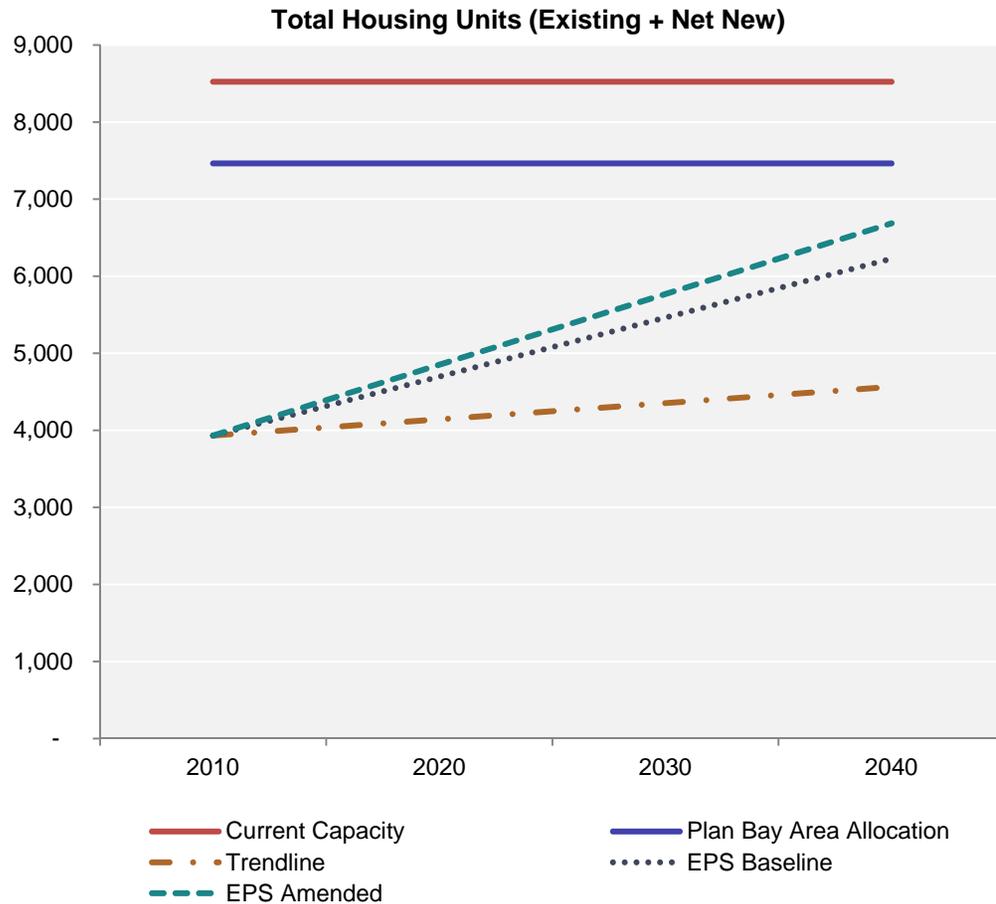
**Table A-32. Pittsburg: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	2,064				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,830	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	234				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,064	2,064	2,064	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.40	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support Market and Investment Attractiveness Infrastructure Capacity, Needs, and Financing</i>		0.00 0.65 0.15	0.00 0.55 0.05	0.00 0.35 0.05	
7	EPS estimate of housing production given constraints		413	826	1,238			
8	Percentage of PDA 2040 housing allocation accommodated		22.6%	45.1%	67.7%			
		Summary	Limited opportunity sites in the Downtown PDA market conditions currently and will continue to limit realization of the PDA housing allocation. There are also the need to revitalize the downtown as a place people want to visit that limit development in this area.					
			<b>Infrastructure Capacity is improved through development-based funding and other sources. Improved financing planning in place.</b>					

**Table A-32. Pittsburg: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	General Plan and existing zoning regulations. EIR on General Plan.  <b>Creation of Specific Plan improves readiness.</b>	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Some potential for displacement (replacement) of existing lower density residential uses	
		3	Time required and difficulty in obtaining entitlement: institutional capacity and jurisdictional track record	0.00	0.00	0.00		
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.40</b>	<b>0.25</b>	0.00	Very limited residential development in recent post-Recession period; prior to that Pittsburg dominated by single family and attached single family development. Conditions expected to improve during forecast period.	
		2	Recent Local Development Activity (pipeline)	<b>0.05</b>	0.00	0.00	Some ongoing renovation and remodeling only.	
		3	General Market Conditions	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	The lack of vitality in the downtown and related commercial or institutional attractions create a disincentive for multifamily development in the area	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Modest pricing makes new construction challenging.	
		5	Parcel size and configuration	0.00	<b>0.10</b>	<b>0.15</b>	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <b>Restored site assembly tools can reduce this constraint.</b>	
		6	Existence of major investment disincentives	0.00	0.00	0.00		
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Existing infrastructure has capacity to accommodate planned development capacity; some site-related and utility improvements will be required.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	<b>0.05</b>	0.00	0.00	No.  <b>Improved financing planning in place.</b>	
		3	PDA financing capacity	<b>0.10</b>	<b>0.05</b>	<b>0.05</b>	Financing capacity will be limited by lack of investment in the coming years and over time by the need for additional infrastructure investments.  <b>Infrastructure capacity is improved through development-based funding and other sources.</b>	

# Pittsburg: Railroad Avenue eBART Station



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,530	4,591	2,296	65%	Modest pricing and infill parcelization	2,755	78%	Parcel assembly tools available and infrastructure financing plan available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-33. Pittsburg: Railroad Avenue eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	4,591				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				3,530	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	1,061					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		4,591	4,591	4,591		
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.50		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.75	0.55	0.40				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.15	0.10				
7	EPS estimate of housing production given constraints		459	1,377	2,296				
8	Percentage of PDA 2040 housing allocation accommodated		13.0%	39.0%	65.0%				
	Summary		While there are adequate opportunity sites in the Railroad Avenue PDA, market conditions currently and will continue to limit full realization of the PDA housing allocation.						

**Table A-33. Pittsburg: Railroad Avenue eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	A specific plan was prepared and adopted for the area in 2009 along with a program EIR
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No. Opportunity sites would convert existing underutilized commercial lands.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.35	0.25	0.15	Very limited residential development in recent post-Recession period; prior to that Pittsburg dominated by single family and attached single family development. Conditions expected to improve during forecast period.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	Two low density residential projects have been recently approved in the area.
		3	General Market Conditions		0.10	0.05	0.00	General market conditions in Pittsburg, reflecting a pattern affecting East Contra Costa County, have not rebounded from Recession conditions as well as other parts of the Bay Area. Conditions are expected to improve during the forecast period.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Demand and pricing for mixed use/multifamily residential development remain weak in Pittsburg; pricing and competitive (with single family and attached single family development)
		5	Parcel size and configuration		0.00	0.10	0.15	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid
		6	Existence of major investment disincentives		0.10	0.05	0.00	Lack of comparable multi-family development in the East County area remains a disincentive to the higher density residential development envisioned in the PDA housing allocation.
		7	Local Government Support		0.00	0.00	0.00	Local government support is not a criterion for this study.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	Existing infrastructure can largely accommodate new development; anticipates only modest improvements required.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.00	Financing Plan included in the Specific Plan.
		3	PDA financing capacity		0.05	0.05	0.05	Financing capacity will be limited by lack of investment in the coming years. Modest market pricing limits ability to generate funding through requirements on new development.

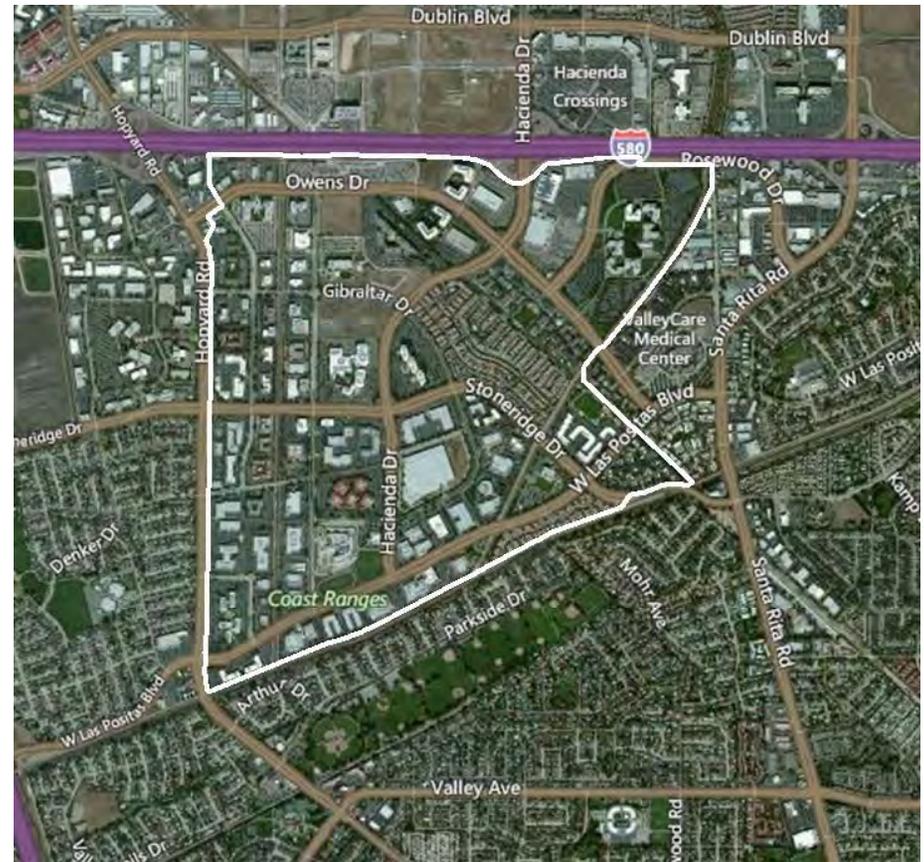
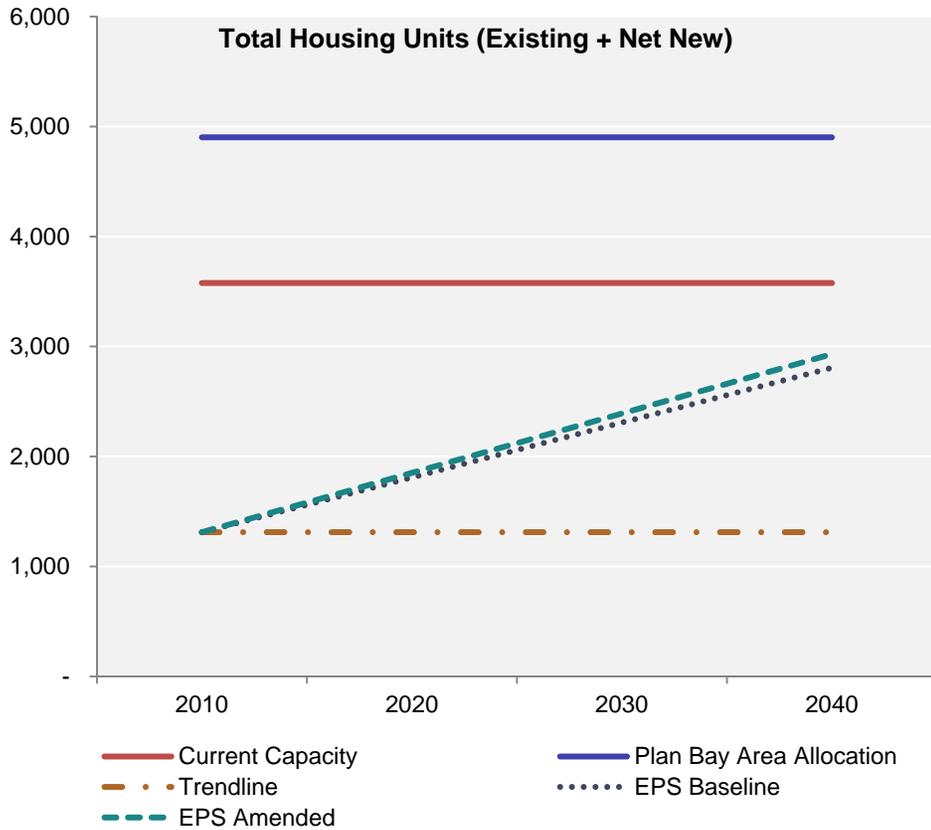
**Table A-33. Pittsburg: Railroad Avenue eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	4,591				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	Plan Bay Area new housing allocation				3,530	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,061				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		4,591	4,591	4,591	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.40	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment</i>		0.75	0.55	0.35			
	<i>Attractiveness</i>							
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.15	0.05			
7	EPS estimate of housing production given constraints		459	1,377	2,755			
8	Percentage of PDA 2040 housing allocation accommodated		13.0%	39.0%	78.0%			
	Summary	<p>While there are adequate opportunity sites in the Railroad Avenue PDA, market conditions currently and will continue to limit full realization of the PDA housing allocation.</p> <p style="color: red;">Efforts are made to assemble parcels. External funding sources for infrastructure enhance feasibility for new development.</p>						

**Table A-33. Pittsburg: Railroad Avenue eBART Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	A specific plan was prepared and adopted for the area in 2009 along with a program EIR
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No. Opportunity sites would convert existing underutilized commercial lands.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.35	0.25	0.15	Very limited residential development in recent post-Recession period; prior to that Pittsburg dominated by single family and attached single family development. Conditions expected to improve during forecast period.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	Two low density residential projects have been recently approved in the area.
		3	General Market Conditions		0.10	0.05	0.00	General market conditions in Pittsburg, reflecting a pattern affecting East Contra Costa County, have not rebounded from Recession conditions as well as other parts of the Bay Area. Conditions are expected to improve during the forecast period.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Demand and pricing for mixed use/multifamily residential development remain weak in Pittsburg; pricing and competitive (with single family and attached single family development)
		5	Parcel size and configuration		0.00	0.10	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <b>Efforts are made to assemble parcels.</b>
		6	Existence of major investment disincentives		0.10	0.05	0.00	Lack of comparable multi-family development in the East County area remains a disincentive to the higher density residential development envisioned in the PDA housing allocation.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	Existing infrastructure can largely accommodate new development; anticipates only modest improvements required.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.00	Financing Plan included in the Specific Plan.
		3	PDA financing capacity		0.05	0.05	0.00	Financing capacity will be limited by lack of investment in the coming years. Modest market pricing limits ability to generate funding through requirements on new development.  <b>Infrastructure capacity is improved through external funding sources, promoting development feasibility.</b>

# Pleasanton: Hacienda



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,590	2,266	1,496	42%	Lack of plan and community opposition	1,620	45%	A specific plan is begun and completed; Successful opposition to development lessened

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,266				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,590	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,324)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	The baseline scenario assumes some rezoning will occur in the PDA on a project by project basis.
		5	Estimated gross housing capacity at each period		2,266	2,266	2,493	
		6	Sum of Capacity Constraint Coefficients		0.95	0.65	0.40	
			<i>Planning and Entitlement Criteria</i>		0.05	0.05	0.00	
			<i>Community Support</i>		0.40	0.40	0.40	
	<i>Market and Investment Attractiveness</i>		0.30	0.10	0.00			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.10	0.00			
7	EPS estimate of housing production given constraints			113	793	1,496		
8	Percentage of PDA 2040 housing allocation accommodated			3.2%	22.1%	41.7%		
	Summary		Pleasanton's PDA includes a number of business parks, commercial area, and some residential in proximity to the Pleasanton BART station. No specific plan is in place for the PDA; the site is zoned Planning Unit Development (PUD). The City adopted a growth management ordinance in February 2015 limiting residential growth to 235 units per year. While the City's has historically had growth controls in place, a court case loss led to several affordable and market rate multifamily project-approvals. The City's ability to approve future higher density development is difficult to predict in this environment.					

**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.05	0.00	No, the City has not adopted a Specific Plan for the PDA; much of the PDA is currently zoned Planned Unit Development.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None assumed.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.20	0.20	0.20	The City Council adopted a limit on residential construction in the City of not more than 235 units per year (with limited exceptions). Elected officials in the City have been reluctant to approve multifamily development in the City.
		2	History of neighborhood opposition		0.20	0.20	0.20	The City has an active and successful group of multifamily development opponents.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.00	0.00	0.00	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 485 units permitted per year between 1990 and 2013. The PDA would need to average 126 units per year between 2010 and 2040 to achieve its unit-allocation.
		2	Recent Local Development Activity (pipeline)		0.15	0.00	0.00	No major projects are in the pipeline in the PDA.
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 52% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$91,000 in 2012, compared with \$80,300 Bay Area-wide.

**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint		0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$435 per square foot for condos. These prices are sufficient to justify multifamily development of the density needed to reach the 2040 allocation.
		5	Parcel size and configuration		0.00	0.00	0.00	Not a constraint.
		6	Existence of major investment disincentives		0.15	0.10	0.00	The City is actively pursuing information related to the availability of water in the City for new development.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Not a known constraint.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.20	0.10	0.00	The area does not have a CIP at this time, but the City is likely to develop one to facilitate reinvestment in the business parks and presumably other types of development.
		3	PDA financing capacity		0.00	0.00	0.00	

**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,266				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,590	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,324)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	The baseline scenario assumes some rezoning will occur in the PDA on a project by project basis.
		5	Estimated gross housing capacity at each period		2,266	2,266	2,493	
		6	Sum of Capacity Constraint Coefficients		0.95	0.60	0.35	
			<i>Planning and Entitlement Criteria</i>		0.10	0.05	0.05	
			<i>Community Support</i>		0.35	0.35	0.30	
	<i>Market and Investment Attractiveness</i>		0.30	0.10	0.00			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.10	0.00			
7	EPS estimate of housing production given constraints			113	906	1,620		
8	Percentage of PDA 2040 housing allocation accommodated			3.2%	25.2%	45.1%		
	Summary		<p>Pleasanton's PDA includes a number of business parks, commercial area, and some residential in proximity to the Pleasanton BART station. No specific plan is in place for the PDA; the site is zoned Planning Unit Development (PUD). The City adopted a growth management ordinance in February 2015 limiting residential growth to 235 units per year. While the City's has historically had growth controls in place, a court case loss led to several affordable and market rate multifamily project-approvals. The City's ability to approve future higher density development is difficult to predict in this environment.</p> <p><b>In the amended scenario, the success of community and political opposition to higher density development is modestly reduced. A specific plan for the site is prepared and multifamily sites are identified and appropriately zoned.</b></p>					

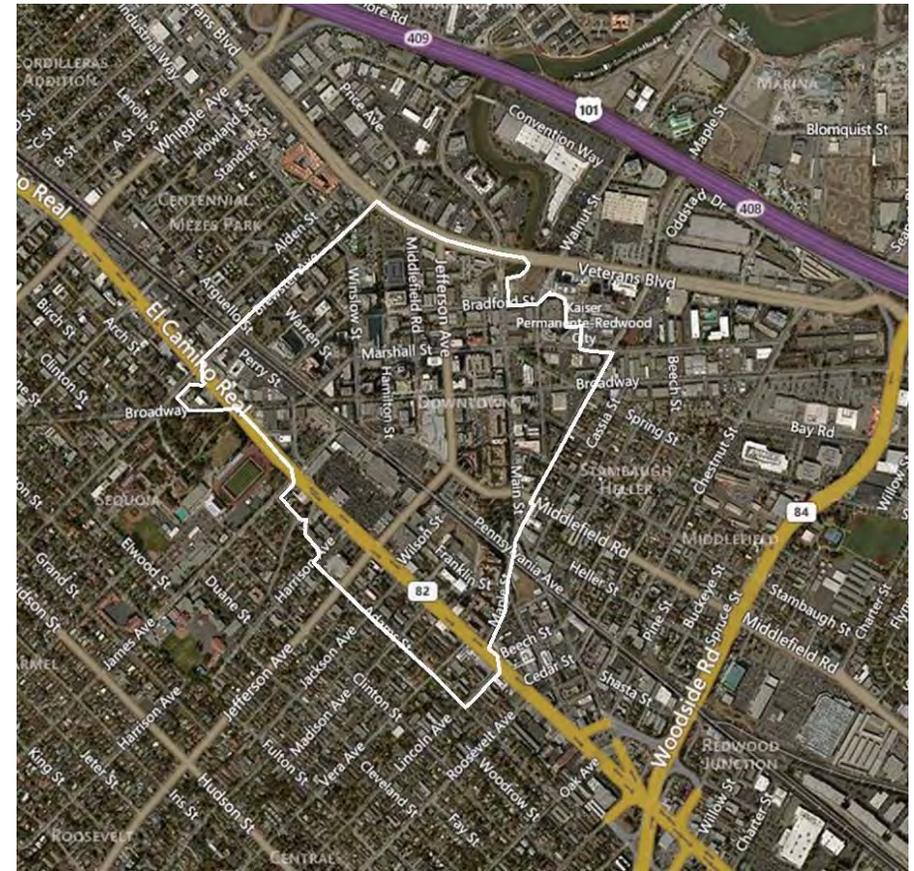
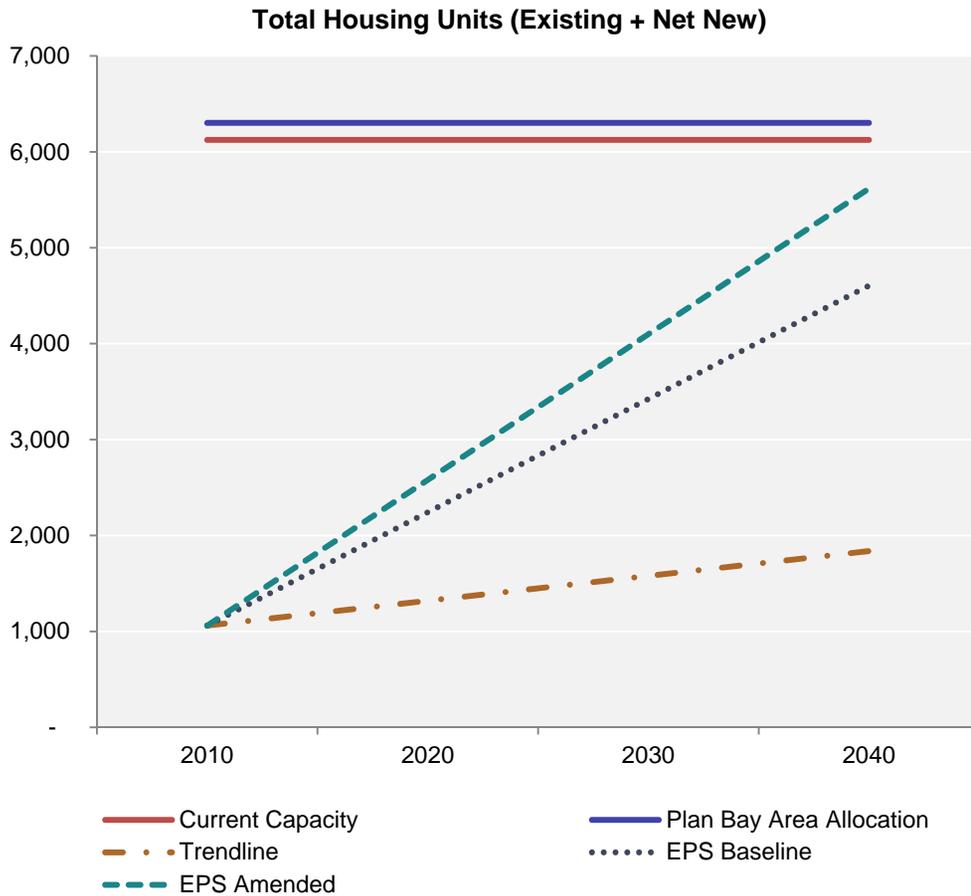
**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	No, the City has not adopted a Specific Plan for the PDA; much of the PDA is currently zoned Planned Unit Development.  <i>Assume in the amended scenario that a Specific Plan is begun sooner than in the baseline scenario.</i>
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.15	0.15	0.15	The City Council adopted a limit on residential construction in the City of not more than 235 units per year (with limited exceptions). Elected officials in the City have been reluctant to approve multifamily development in the City.
		2	History of neighborhood opposition		0.20	0.20	0.15	The City has an active and successful group of multifamily development opponents.  <i>In the amended scenario, assume that community opposition to higher density development in appropriate locations is reduced.</i>
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.00	0.00	0.00	Investment in new housing in Contra Costa County is still in post-Recession recovery. The total number of units permitted in the County in 2013 was about 30% of the peak-level reached in 2003. This is lower than the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.  The City as a whole averaged about 485 units permitted per year between 1990 and 2013. The PDA would need to average 126 units per year between 2010 and 2040 to achieve its unit-allocation.
		2	Recent Local Development Activity (pipeline)		0.15	0.00	0.00	No major projects are in the pipeline in the PDA.
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate lower sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively strong market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 52% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$91,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$435 per square foot for condos. These prices are sufficient to justify multifamily development of the density needed to reach the 2040 allocation.

**Table A-34. Pleasanton: Hacienda**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Not a constraint.
		6	Existence of major investment disincentives		0.15	0.10	0.00	The City is actively pursuing information related to the availability of water in the City for new development.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Not a constraint.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.20	0.10	0.00	The area does not have a CIP at this time, but the City is likely to develop one to facilitate reinvestment in the business parks and presumably other types of development.
		3	PDA financing capacity		0.00	0.00	0.00	

# Redwood City: Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
5,240	5,063	3,544	68%	Infill parcelization	4,557	87%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-35. Redwood City: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,063				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				5,240	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(177)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		5,063	5,063	5,063	
		6	Sum of Capacity Constraint Coefficients		0.70	0.45	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.30	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.15	0.15	
		7	EPS estimate of housing production given constraints		1,519	2,785	3,544	
		8	Percentage of PDA 2040 housing allocation accommodated		29.0%	53.1%	67.6%	
			Summary	The Downtown Redwood City PDA is undergoing a rapid transformation with major commercial and housing developments completed and under construction. Over time there will limitations imposed by a lack of adequate opportunity sites that may constrain development below the PDA housing allocation target.				

**Table A-35. Redwood City: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Downtown Plan and Program EIR in place.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City has been supportive of planned development in the City.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Limited opposition has been expressed.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.10	0.00	Strong market conditions have prevailed on the Peninsula in during the past three or four years.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 1,700 units have been approved during past four years.	
		3	General Market Conditions	0.10	0.10	0.00	Strong general market conditions, expressed by sales prices and rents, prevail on the Peninsula generally and in Redwood City in particular	
		4	Financial Feasibility Constraint	0.20	0.00	0.00	Market conditions and development activity will encourage continued investment and site assembly.	
		5	Parcel size and configuration	0.05	0.10	0.15	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.10	0.15	Roadway, streetscape, and parking improvements insufficient to meet demands of new development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	City is in the process of updating its development impact fees and other infrastructure financing mechanisms	
		3	PDA financing capacity	0.00	0.00	0.00	New development will generate substantial financing capacity.	

**Table A-35. Redwood City: Downtown**

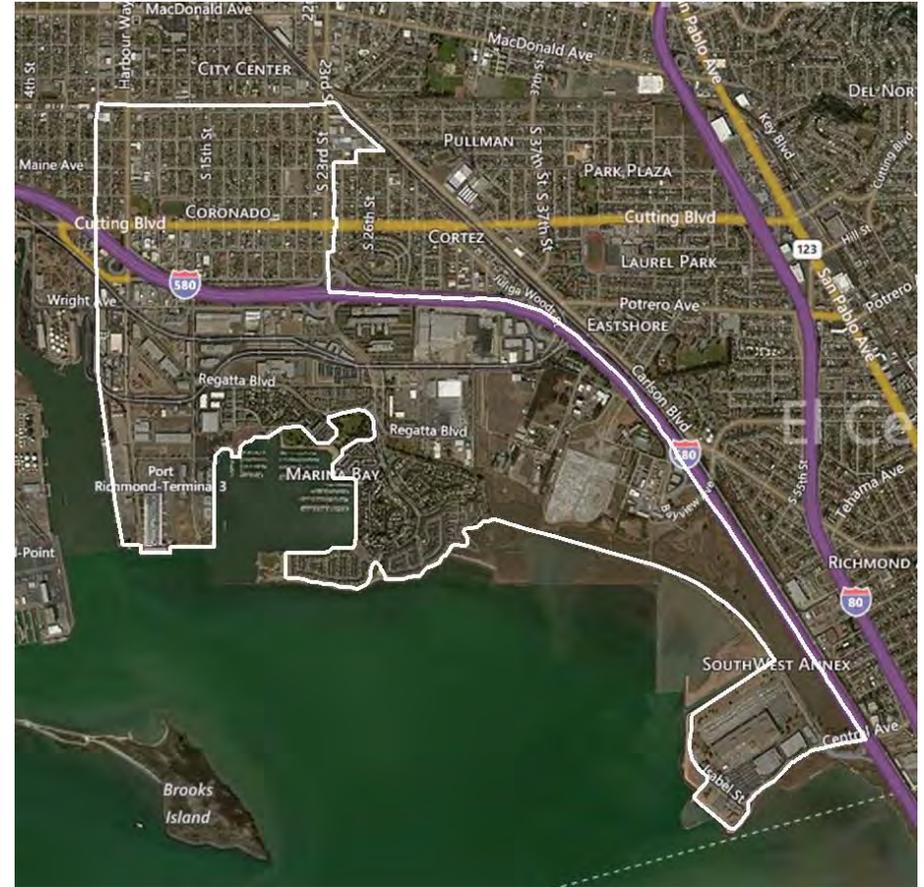
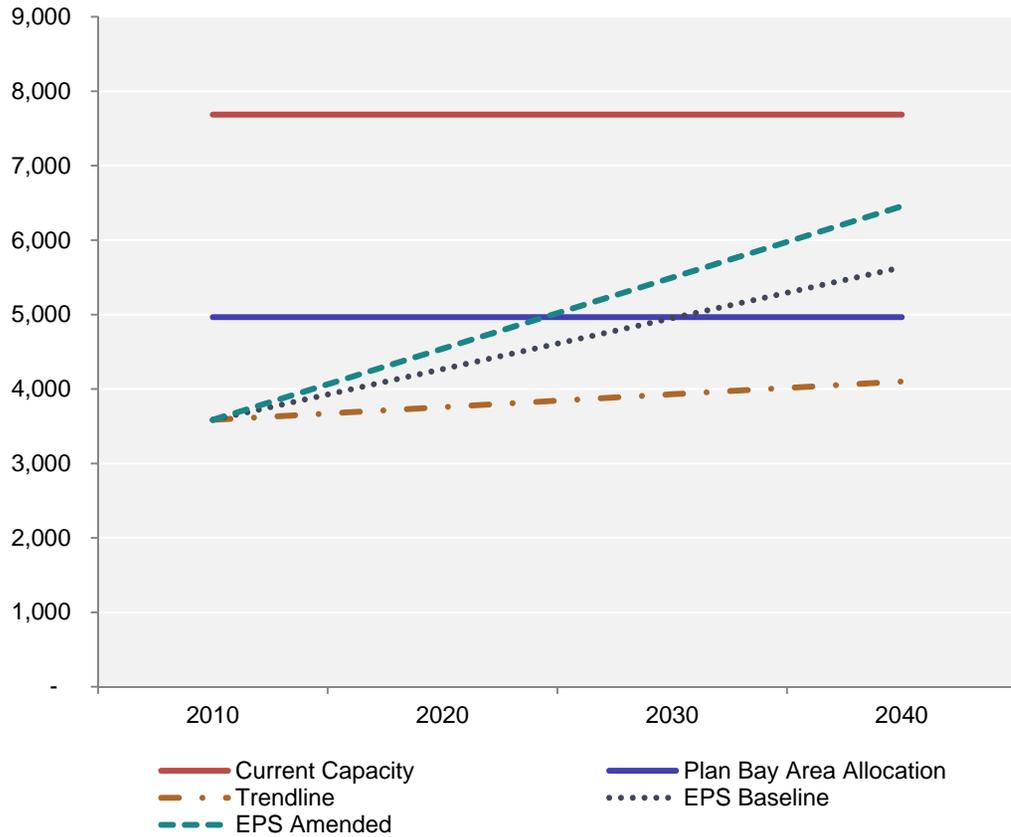
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,063				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				5,240	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(177)				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		5,063	5,063	5,063	
		6	Sum of Capacity Constraint Coefficients		0.70	0.40	0.10	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.25	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.15	0.10	
		7	EPS estimate of housing production given constraints		1,519	3,038	4,557	
		8	Percentage of PDA 2040 housing allocation accommodated		29.0%	58.0%	87.0%	
			Summary	<p>The Downtown Redwood City PDA is undergoing a rapid transformation with major commercial and housing developments completed and under construction. Over time there will limitations imposed by a lack of adequate opportunity sites that may constrain development below the PDA housing allocation target.</p> <p>City efforts to incentivize parcel assembly and reuse of existing sites are put in place. Infrastructure constraints relieved by additional financial planning and investment. Financing plan and funding developed by City.</p>				

**Table A-35. Redwood City: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Downtown Plan and Program EIR in place.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City has been supportive of planned development in the City.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Limited opposition has been expressed.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.10	0.00	Strong market conditions have prevailed on the Peninsula in during the past three or four years.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Approximately 1,700 units have been approved during past four years.	
		3	General Market Conditions	0.10	0.10	0.00	Strong general market conditions, expressed by sales prices and rents, prevail on the Peninsula generally and in Redwood City in particular	
		4	Financial Feasibility Constraint	0.20	0.00	0.00	Market conditions and development activity will encourage continued investment and site assembly.	
		5	Parcel size and configuration	0.05	0.05	0.00	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <i>City efforts to incentivize parcel assembly and reuse of existing sites are put in place.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.10	0.10	Roadway, streetscape, and parking improvements insufficient to meet demands of new development.  <i>Infrastructure constraints relieved by additional financial planning and investment.</i>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	City is in the process of updating its development impact fees and other infrastructure financing mechanisms.  <i>Financing plan and funding developed by City.</i>	
		3	PDA financing capacity	0.00	0.00	0.00	New development will generate substantial financing capacity.	

# Richmond: South Richmond

**Total Housing Units (Existing + Net New)**



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,380	4,100	2,050	149%	Modest pricing	2,870	208%	Improve infrastructure financing strategy

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-36. Richmond: South Richmond**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,100				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				1,380	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	2,720					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		4,100	4,100	4,100		
		6	Sum of Capacity Constraint Coefficients		0.90	0.60	0.50		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support Market and Investment Attractiveness Infrastructure Capacity, Needs, and Financing</i>		0.00 0.70 0.20	0.00 0.40 0.20	0.00 0.30 0.20		
7	EPS estimate of housing production given constraints		410	1,640	2,050				
8	Percentage of PDA 2040 housing allocation accommodated		29.7%	118.8%	148.6%				
		Summary	The South Richmond PDA has substantial development capacity and is the site of the proposed UC Global Campus that will bring substantial new employment to the area. Realizing full development potential will require haz mat remediation on a large opportunity site (Zeneca). If this site is remediated the PDA has potential to substantially exceed the existing PDA housing allocation.						

**Table A-36. Richmond: South Richmond**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR in place
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.00	0.00	0.00	Development in Richmond as a whole was severely affected by the price reductions associated with the Recession and local conditions.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	Substantial new development has occurred over the years in the PDA concentrated around the Marina Bay complex. Development activity continues in the area with projects by major developers (Pulte, Signature Properties) underway or completed.
		3	General Market Conditions		0.20	0.10	0.00	Real estate prices in the South Richmond area continue to improve buoyed by the improving East Bay housing market and continued investment in the area.
		4	Financial Feasibility Constraint		0.20	0.10	0.10	Cleanup of Zeneca Site required haz mat remediation that currently renders development of the site infeasible. Major intervention needed to fund the clean-up
		5	Parcel size and configuration		0.00	0.00	0.00	Ample sites converting from historical industrial uses exist.
		6	Existence of major investment disincentives		0.20	0.20	0.20	Hazardous remediation required at Zeneca Site, the largest opportunity site in the PDA
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.10	Existing infrastructure, particularly roadways and other transportation facilities, lack capacity to accommodate new development
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.10	0.10	City is working on financing strategies for funding major infrastructure improvements including roadways, transit, and haz mat remediation.
		3	PDA financing capacity		0.00	0.00	0.00	New development will create substantial financing capacity.

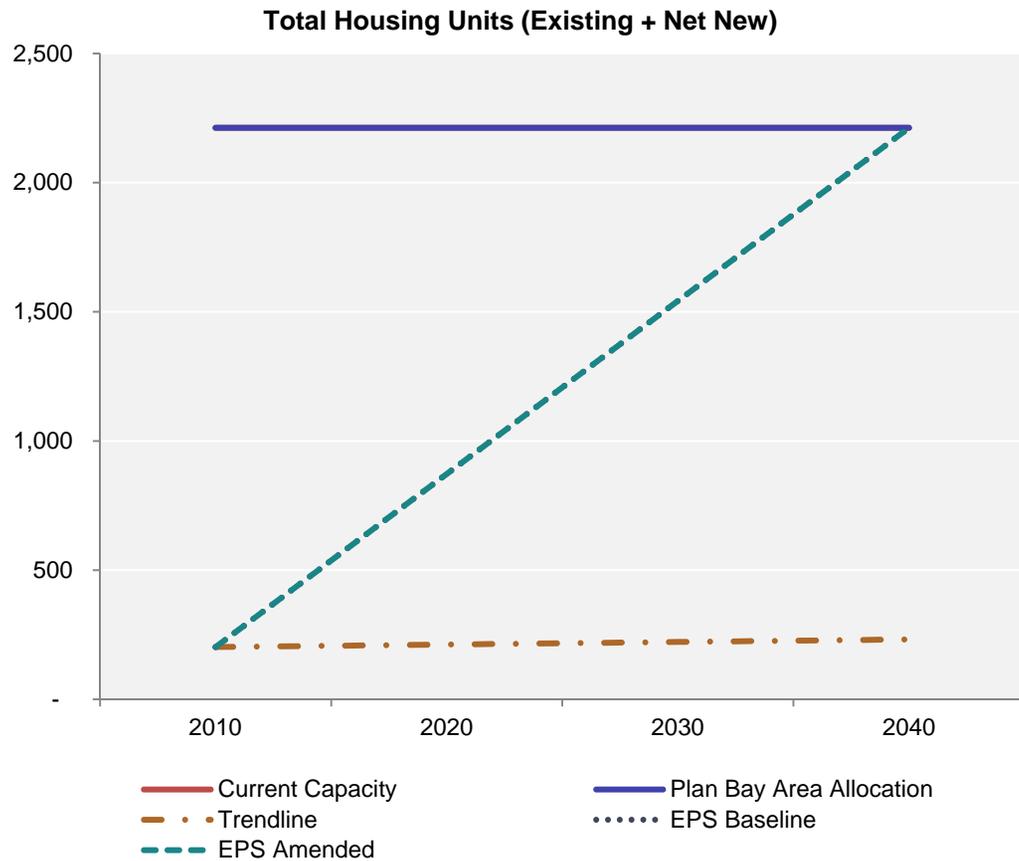
**Table A-36. Richmond: South Richmond**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,100				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,380	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,720				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		4,100	4,100	4,100	
		6	Sum of Capacity Constraint Coefficients		0.90	0.40	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.20	0.10	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.20	0.20	
		7	EPS estimate of housing production given constraints		410	2,460	2,870	
		8	Percentage of PDA 2040 housing allocation accommodated		29.7%	178.3%	208.0%	
			Summary	<p>The South Richmond PDA has substantial development capacity and is the site of the proposed UC Global Campus that will bring substantial new employment to the area. Realizing full development potential will require haz mat remediation on a large opportunity site (Zeneca). If this site is remediated the PDA has potential to substantially exceed the existing PDA housing allocation.</p> <p>Implementation of an EIFD or other area-wide financing will assist in addressing major development constraint (haz mat) in the area in addition to funding necessary infrastructure.</p>				

**Table A-36. Richmond: South Richmond**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR in place	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.00	0.00	0.00	Development in Richmond as a whole was severely affected by the price reductions associated with the Recession and local conditions.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	Substantial new development has occurred over the years in the PDA concentrated around the Marina Bay complex. Development activity continues in the area with projects by major developers (Pulte, Signature Properties) underway or completed.	
		3	General Market Conditions	0.20	0.10	0.00	Real estate prices in the South Richmond area continue to improve buoyed by the improving East Bay housing market and continued investment in the area.	
		4	Financial Feasibility Constraint	0.20	0.10	0.10	Cleanup of Zeneca Site required haz mat remediation that currently renders development of the site infeasible. Major intervention needed to fund the clean-up	
		5	Parcel size and configuration	0.00	0.00	0.00	Ample sites converting from historical industrial uses exist.	
		6	Existence of major investment disincentives	0.20	0.00	0.00	Hazardous remediation required at Zeneca Site, the largest opportunity site in the PDA.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.10	Existing infrastructure, particularly roadways and other transportation facilities, lack capacity to accommodate new development.  <b>Financing strategy that funds remediation of Zeneca site is created.</b>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.10	0.10	City is working on financing strategies for funding major infrastructure improvements including roadways, transit, and haz mat remediation.  <b>Infrastructure improvement financing improves.</b>	
		3	PDA financing capacity	0.00	0.00	0.00	New development will create substantial financing capacity.	

# Rohnert Park: Sonoma Mountain Village



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,010	2,010	2,010	100%	Modest pricing	2,010	100%	No amendments proposed

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-37. Rohnert Park: Sonoma Mountain Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,010				Based upon adopted Planned Development Plan	
		2	<i>Plan Bay Area</i> new housing allocation				2,010	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		2,010	2,010	2,010		
		6	Sum of Capacity Constraint Coefficients		0.70	0.40	0.00		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment</i>		0.70	0.40	0.00		
			<i>Attractiveness</i>		0.00	0.00	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00		
		7	EPS estimate of housing production given constraints		603	1,206	2,010		
		8	Percentage of PDA 2040 housing allocation accommodated		30.0%	60.0%	100.0%		
			Summary	The Sonoma Mountain Village PDA is an old industrial site that has been master planned for a relatively dense mixed use project. While market conditions will constrain development in the early years over time the area is likely to be fully built-out.					

**Table A-37. Rohnert Park: Sonoma Mountain Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Adopted master plan and Program EIR in place
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City has approved a number of large development projects in recent years
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.20	0.10	0.00	Development in Rohnert Park was deeply affected by the Recession, during which little or no new development occurred. Projects planned and approved are now underway including the 1,600 unit University District Plan and a large multi-family complex west of Highway 101.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	None.
		3	General Market Conditions		0.20	0.10	0.00	Market conditions in Sonoma County have lagged other parts of the Bay Area in the post-Recession period. Pricing continue to improve .
		4	Financial Feasibility Constraint		0.30	0.20	0.00	Market pricing will limit development opportunities in the short and mid-term in Rohnert Park.
		5	Parcel size and configuration		0.00	0.00	0.00	None.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Infrastructure needed to support new development largely in place.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Infrastructure funded by existing impact fees in place.
		3	PDA financing capacity		0.00	0.00	0.00	Financing capacity will expand as development proceeds

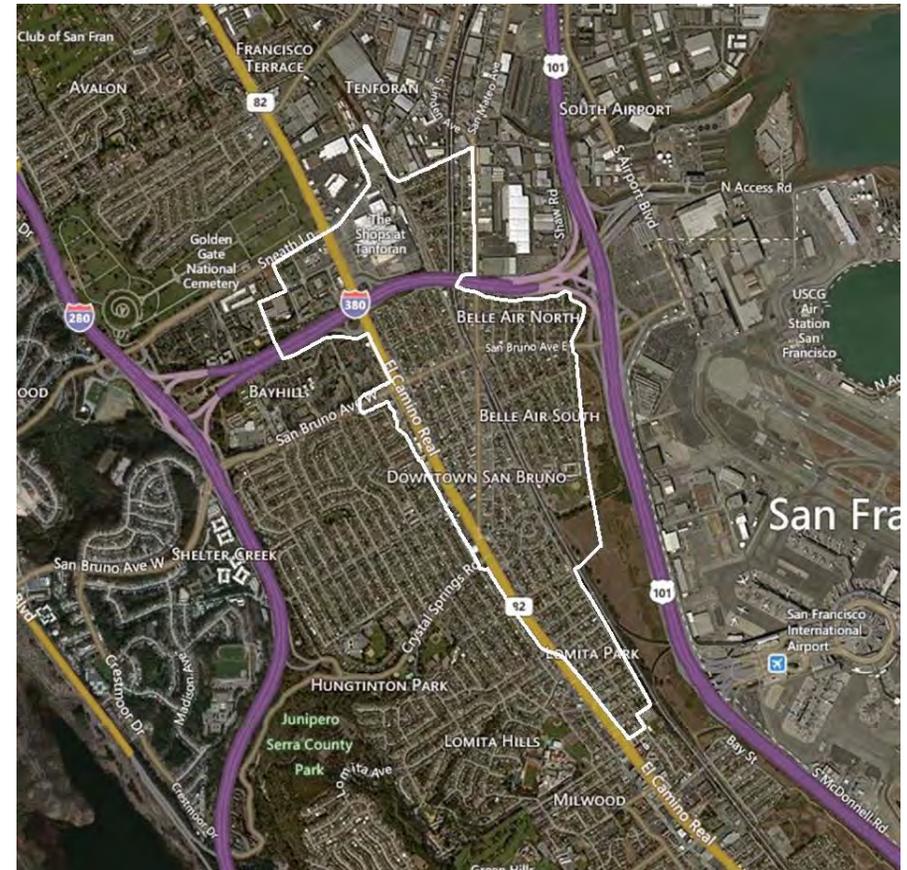
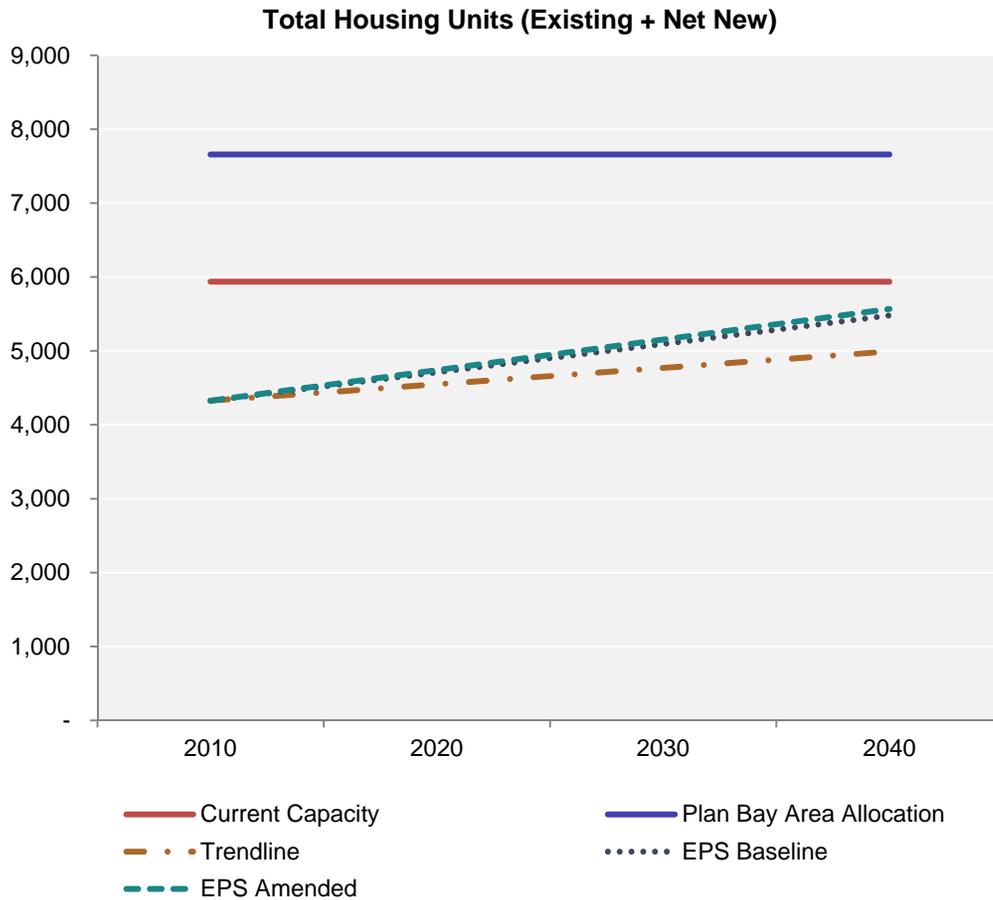
**Table A-37. Rohnert Park: Sonoma Mountain Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,010				Based upon adopted Planned Development Plan	
		2	<i>Plan Bay Area</i> new housing allocation				2,010	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		2,010	2,010	2,010		
		6	Sum of Capacity Constraint Coefficients		0.70	0.40	0.00		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.70	0.40	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00		
		7	EPS estimate of housing production given constraints		603	1,206	2,010		
		8	Percentage of PDA 2040 housing allocation accommodated		30.0%	60.0%	100.0%		
			Summary	The Sonoma Mountain Village PDA is an old industrial site that has been master planned for a relatively dense mixed use project. While market conditions will constrain development in the early years over time the area is likely to be fully built-out.					
				Observed constraints are all market and feasibility related that will improve with time.					

**Table A-37. Rohnert Park: Sonoma Mountain Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Adopted master plan and Program EIR in place	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	City has approved a number of large development projects in recent years	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.10	0.00	Development in Rohnert Park was deeply affected by the Recession, during which little or no new development occurred. Projects planned and approved are now underway including the 1,600 unit University District Plan and a large multi-family complex west of Highway 101.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	None.	
		3	General Market Conditions	0.20	0.10	0.00	Market conditions in Sonoma County continue to improve.	
		4	Financial Feasibility Constraint	0.30	0.20	0.00	Market pricing will limit development opportunities in the short and mid-term.	
		5	Parcel size and configuration	0.00	0.00	0.00	None.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Infrastructure needed to support new development largely in place.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Infrastructure funded by existing impact fees in place.	
		3	PDA financing capacity	0.00	0.00	0.00	Limited financing capacity in comparison to costs will require additional external sources and methods.	

# San Bruno: Transit Corridor



## Net New Units - Allocation, Capacity, and Projection

PDA Name	Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
			Number	% of Total Allocation		Number	% of Total Allocation	
San Bruno: Transit Corridors	3,330	1,610	1,151	35%	Limited site availability	1,240	37%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,610				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,330	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,720)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	
		5	Estimated gross housing capacity at each period		1,610	1,610	1,771	
		6	Sum of Capacity Constraint Coefficients		0.60	0.55	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.60	0.55	0.35			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00			
7	EPS estimate of housing production given constraints		644	725	1,151			
8	Percentage of PDA 2040 housing allocation accommodated		19.3%	21.8%	34.6%			
	<b>Summary</b>	The City of San Bruno adopted the Transit Corridors Specific Plan in 2013. While the Plan has provided relatively generous zoning and guidance for developers, the Transit Corridors is a relatively constrained area, with few readily developable sites and adjacency to single-family neighborhoods.						

**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Yes.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None anticipated.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Officials have been supportive of multifamily in the PDA area.
		2	History of neighborhood opposition		0.00	0.00	0.00	No organized and successful opposition is active in the PDA area.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.10	0.10	Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.  The City as a whole averaged about 65 units permitted per year between 1990 and 2014. The PDA would need to average almost 110 units per year between 2010 and 2040 to achieve its unit-allocation, an increase from the last 20 years.
		2	Recent Local Development Activity (pipeline)		0.25	0.20	0.00	A small amount of residential development is in the pipeline.
		3	General Market Conditions		0.20	0.15	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide condition. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$62,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.05	0.05	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.90 per sq.ft. per month for apartments and \$570 per square foot for condos. These apartment prices are nearly sufficient to justify multifamily development, though most new uses would need to also displace the economic value of existing uses.

**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.05	0.10	The constrained environment presents an increase constraint on development.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None known.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	No major deficiencies reported.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The Specific Plan includes an assessment of the required improvements for intensification.
		3	PDA financing capacity		0.00	0.00	0.00	The City currently changes park-in-lieu fees but has not yet adopted other financing mechanisms for improvements. This is not anticipated to be a major constraint on development, however.

**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,610				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,330	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,720)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	
		5	Estimated gross housing capacity at each period		1,610	1,610	1,771	
		6	Sum of Capacity Constraint Coefficients		0.60	0.50	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.60	0.50	0.30			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00			
7	EPS estimate of housing production given constraints		644	805	1,240			
8	Percentage of PDA 2040 housing allocation accommodated		19.3%	24.2%	37.2%			
	Summary		<p>The City of San Bruno adopted the Transit Corridors Specific Plan in 2013. While the Plan has provided relatively generous zoning and guidance for developers, the Transit Corridors is a relatively constrained area, with few readily developable sites and adjacency to single-family neighborhoods.</p> <p><b>In the amended scenario, a City or another entity would have parcel assembly tools available to assemble parcels and create more redevelopment sites.</b></p>					

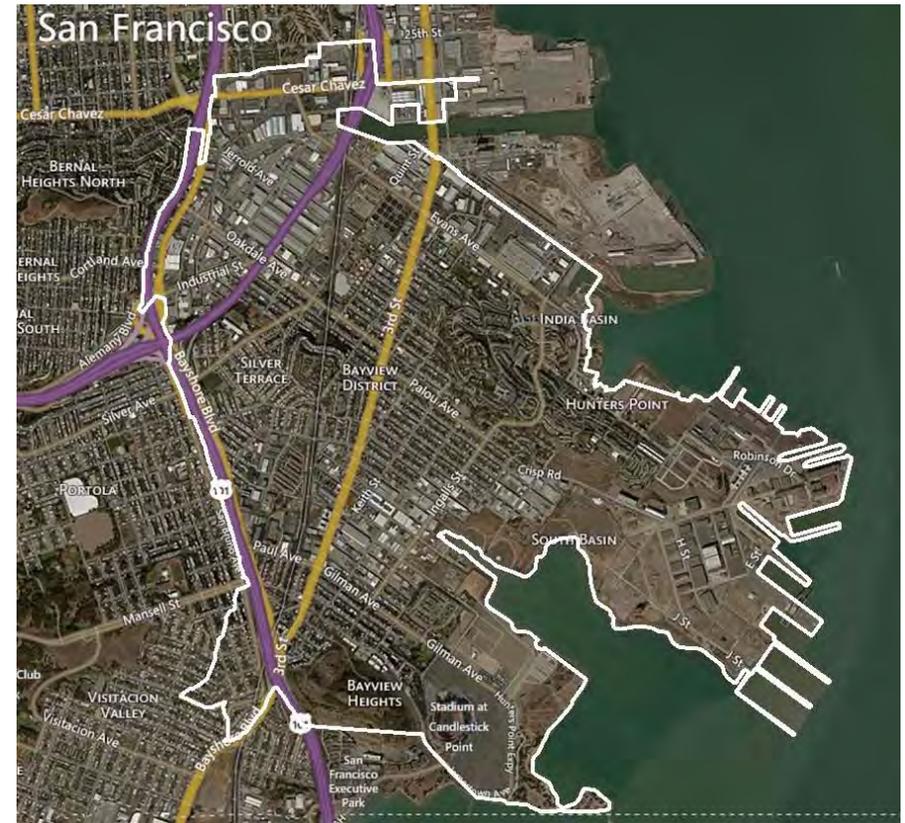
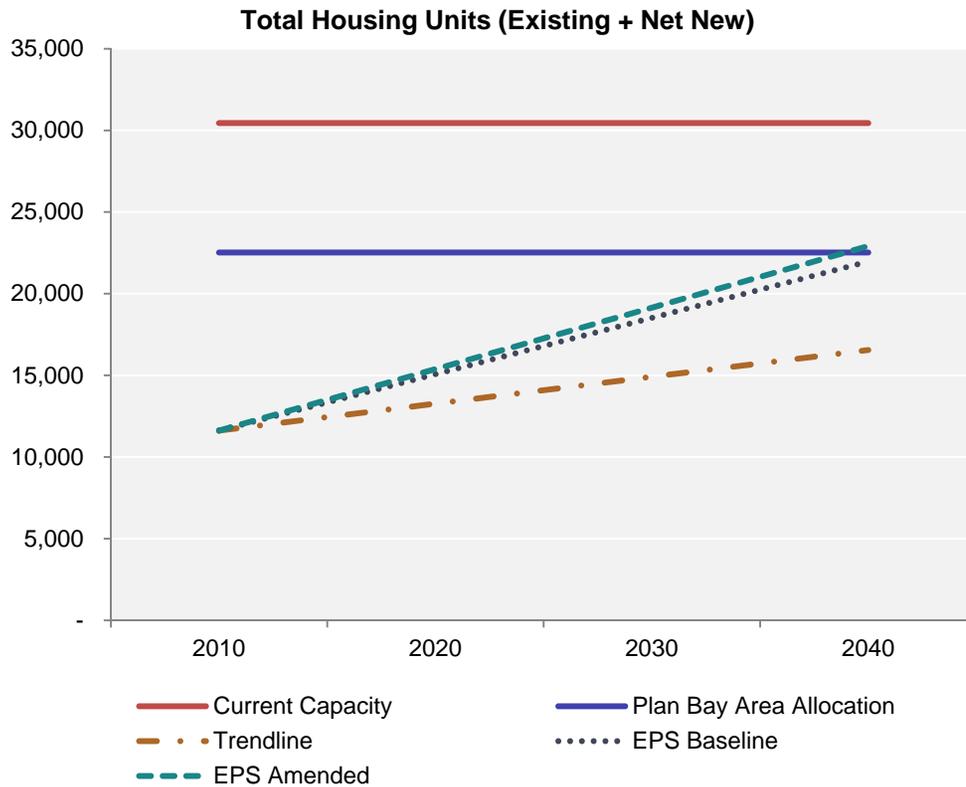
**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Yes.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None anticipated.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Officials have been supportive of multifamily in the PDA area.
		2	History of neighborhood opposition		0.00	0.00	0.00	No organized and successful opposition is active in the PDA area.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.10	0.10	Investment in new housing in San Mateo County has recovered from the Recession period. The total number of units permitted in the County in 2014 2013, and 2014 averaged 3,400 units countywide, surpassing the peak reached in the mid-2000s of 3,000 units.  The City as a whole averaged about 65 units permitted per year between 1990 and 2014. The PDA would need to average almost 110 units per year between 2010 and 2040 to achieve its unit-allocation, an increase from the last 20 years.
		2	Recent Local Development Activity (pipeline)		0.25	0.20	0.00	A small amount of residential development is in the pipeline.
		3	General Market Conditions		0.20	0.15	0.10	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide condition. The proportion of PDA residents with 4-year college degree or higher was 25% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$62,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.05	0.05	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.90 per sq.ft. per month for apartments and \$570 per square foot for condos. These apartment prices are nearly sufficient to justify multifamily development, though most new uses would need to also displace the economic value of existing uses.

**Table A-38. San Bruno: Transit Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.05	The constrained environment presents an increase constraint on development.  <i>In the amended scenario, low-intensity uses on adjacent parcels would be assembled to create redevelopment sites.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	None known.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	No major deficiencies reported.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The Specific Plan includes an assessment of the required improvements for intensification.
		3	PDA financing capacity		0.00	0.00	0.00	The City currently changes park-in-lieu fees but has not yet adopted other financing mechanisms for improvements. This is not anticipated to be a major constraint on development, however.

# San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
10,900	18,826	10,354	95%	Less proven market and infrastructure needs	11,296	104%	External infrastructure funding

**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	18,826				City reports capacity for 18,826 including major projects and other soft sites under current zoning. Figures include 12,100 units entitled for BVHP/Candlestick Point and another ~2,000 units being explored for India Springs and former PG&E site.
		2	<i>Plan Bay Area</i> new housing allocation				10,900	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	7,926				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning already includes extensive intensification, and is not expected to be increased in the foreseeable future.
		5	Estimated gross housing capacity at each period		18,826	18,826	18,826	
		6	Sum of Capacity Constraint Coefficients		0.90	0.65	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.60	0.40	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.05	0.05	
		7	EPS estimate of housing production given constraints		1,883	6,589	10,354	
		8	Percentage of PDA 2040 housing allocation accommodated		17.3%	60.5%	95.0%	
		<b>Summary</b>		This area is unique in that it involves several very large projects and relatively few small projects. BVHP/Candlestick has been extensively planned and entitled, and environmental clearance is being pursued on the India Springs project. Entitled housing capacity may exceed the Plan Bay Area allocation. This remains a less-proven market than other parts of the City, but initial investments and the scale of the projects should significantly alter market perception of the area. Upfront infrastructure investments are significant, but once in place, this area should change rapidly and accommodate significant housing production.				

**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	BVHP/Candlestick plan and EIR already complete, India Springs EIR sought by 2017.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required for the proposed developments
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Yes, as evident through plan adoption as well as stated goals of housing intensification throughout the City.
		2	History of neighborhood opposition		0.00	0.00	0.00	Community has been engaged in project planning and there have been some controversies given the scale of the development, but ultimately the major projects are being approved.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.60	0.50	0.40	City reports that 707 units have been constructed between 2000-2014 in this PDA. However, the major opportunity sites of the Shipyard, India Springs, and former PG&E property have not yet undergone the bulk of their planned development.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Major entitlements in place for BVHP/Candlestick, and new India Springs project entitlement is being pursued presently. Developers actively engaged on these major projects. City indicates there are 11,014 units currently in the pipeline in this PDA.
		3	General Market Conditions		0.05	0.05	0.00	Area has historically been among the lower income areas of San Francisco, and is somewhat less accessible than many areas of the City, but overall City housing market has been very strong for many years. Buildout of new projects can be expected to alter area perceptions over time.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Comparatively modest price points (vs. much of the City) may constrain development in "down market" cycles, but are generally high enough to support new construction.

**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	Parcels are large and well configured for significant development.	
		6	Existence of major investment disincentives	0.10	0.05	0.00	Area perceived to have higher crime, poorer schools, and less accessibility than other areas of the City. These perceptions may improve over time as new development is added to the area.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.00	0.00	Major infrastructure upgrades required for development in this area, including in-tract work as well as off-site improvements. Specific Plans identify needs ranging from streets and utilities to open space.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Citywide fees apply, and primary developer (Lennar) is responsible for many specific on-site improvements.	
		3	PDA financing capacity	0.10	0.05	0.05	Strong expected unit values should be able to support significant infrastructure costs. However, scale of upfront investment, even if recouped over long-term, is daunting and can slow development until market is extremely strong.	

**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	18,826				City reports capacity for 18,826 including major projects and other soft sites under current zoning. Figures include 12,100 units entitled for BVHP/Candlestick Point and another ~2,000 units being explored for India Springs and former PG&E site.
		2	<i>Plan Bay Area</i> new housing allocation				10,900	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	7,926				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Zoning already includes extensive intensification, and is not expected to be increased in the foreseeable future.
		5	Estimated gross housing capacity at each period		18,826	18,826	18,826	
		6	Sum of Capacity Constraint Coefficients		0.90	0.65	0.40	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.60	0.40	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.05	0.00	
		7	EPS estimate of housing production given constraints		1,883	6,589	11,296	
		8	Percentage of PDA 2040 housing allocation accommodated		17.3%	60.5%	103.6%	
		Summary		This area is unique in that it involves several very large projects and relatively few small projects. BVHP/Candlestick has been extensively planned and entitled, and environmental clearance is being pursued on the India Springs project. Entitled housing capacity may exceed the Plan Bay Area allocation. This remains a less-proven market than other parts of the City, but initial investments and the scale of the projects should significantly alter market perception of the area. Upfront infrastructure investments are significant, but once in place, this area should change rapidly and accommodate significant housing production.				
Amended scenario assumes external funding for infrastructure can expedite development.								

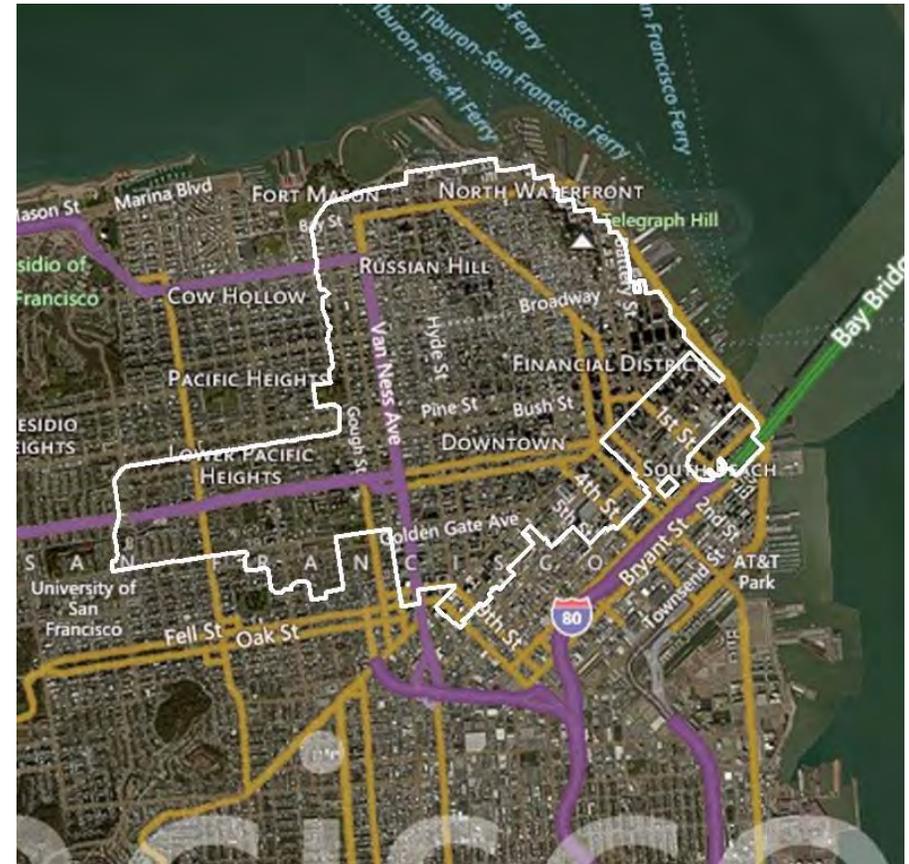
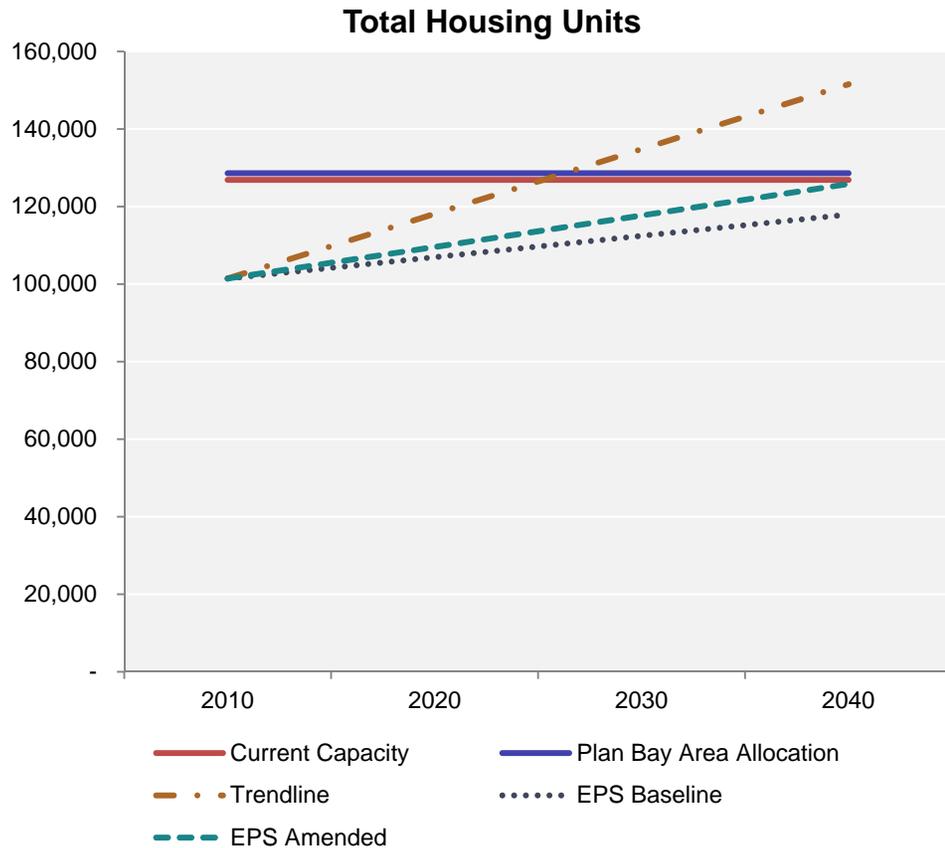
**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	BVHP/Candlestick plan and EIR already complete, India Springs EIR sought by 2017.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required for the proposed developments	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Yes, as evident through plan adoption as well as stated goals of housing intensification throughout the City.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Community has been engaged in project planning and there have been some controversies given the scale of the development, but ultimately the major projects are being approved.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.60	0.50	0.40	City reports that 707 units have been constructed between 2000-2014 in this PDA. However, the major opportunity sites of the Shipyard, India Springs, and former PG&E property have not yet undergone the bulk of their planned development.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Major entitlements in place for BVHP/Candlestick, and new India Springs project entitlement is being pursued presently. Developers actively engaged on these major projects. City indicates there are 11,014 units currently in the pipeline in this PDA.	
		3	General Market Conditions	0.05	0.05	0.00	Area has historically been among the lower income areas of San Francisco, and is somewhat less accessible than many areas of the City, but overall City housing market has been very strong for many years. Buildout of new projects can be expected to alter area perceptions over time.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Comparatively modest price points (vs. much of the City) may constrain development in "down market" cycles, but are generally high enough to support new construction.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcels are large and well configured for significant development.	
		6	Existence of major investment disincentives	0.10	0.05	0.00	Area perceived to have higher crime, poorer schools, and less accessibility than other areas of the City. These perceptions may improve over time as new development is added to the area.	

**Table A-39. San Francisco: Bayview/Hunters Point Shipyard/Candlestick Point**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.05	0.00	0.00	Major infrastructure upgrades required for development in this area, including in-tract work as well as off-site improvements. Specific Plans identify needs ranging from streets and utilities to open space.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Citywide fees apply, and primary developer (Lennar) is responsible for many specific on-site improvements.
		3	PDA financing capacity		0.10	0.05	0.00	Strong expected unit values should be able to support significant infrastructure costs. However, scale of upfront investment, even if recouped over long-term, is daunting and can slow development until market is extremely strong.  Amended scenario assumes external funding can expedite infrastructure investment and overall development.

# San Francisco: Downtown - Van Ness - Geary



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
27,140	25,423	16,525	61%	Site availability, infill parcelization and desired transit capacity increases	24,406	90%	Some increased zoning capacity, parcel assembly tools, and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	25,423				City indicates 25,423 under current zoning, including 3,081 units already delivered 2011-2014, 6,707 in the pipeline, and 15,635 on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				27,140	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,717)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Plans for PDA include Downtown Plan (1980s), Van Ness Area Plan (1980s), Rincon Hill Plan (2005), Chinatown, Civic Center, Northeast Waterfront Plan, Central Corridors Plan (to be done in next couple years, with potential upzoning). City has shown history of successful upzoning around Downtown (e.g. Rincon Hill and TCDP).
		5	Estimated gross housing capacity at each period		25,423	25,423	25,423	
		6	Sum of Capacity Constraint Coefficients		0.55	0.45	0.35	Major growth requires redevelopment of existing uses on many very small lots, and soft site inventory does not appear to support level of growth allocated. Longer-term challenge includes need for major circulation improvements to facilitate growth, though values can support substantial costs.
			<i>Planning and Entitlement Criteria</i>		0.00	0.05	0.05	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.35	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.05	0.10	
		7	EPS estimate of housing production given constraints		11,440	13,983	16,525	
		8	Percentage of PDA 2040 housing allocation accommodated		42.2%	51.5%	60.9%	Market is very strong but physical capacity of sites individually and in aggregate represents a constraint on development that is likely to worsen over time.
			<b>Summary</b>	Market is very strong and policies are generally supportive of housing intensification, though some portions of PDA will benefit from further planning and environmental clearance than has occurred to date. General infrastructure needs appear supportable due to high unit values, though major transit capacity increases (if necessary) may require external funding sources. Primary constraint on achievable development is the physical capacity of the identified soft sites.				

**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Multiple plans and EIRs affect this area (Central SOMA, Downtown, Rincon Hill, Van Ness, etc.), though not all portions of PDA are covered under existing plans, and more are planned for the future.	
		2	Displacement of existing stable residential neighborhoods	0.00	<b>0.05</b>	<b>0.05</b>	All of PDA is very urban, mixed-use, dynamic, and projected capacity reflects underutilized sites only, though some may be in residential use today. San Francisco has a history of requiring special assistance for displaced residents.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Board is generally supportive of housing intensification in the core areas, and has upzoned certain sites (like the "5M" site) to accommodate more housing. The Mayor has forwarded an aggressive plan to increase housing production throughout the City.	
		2	History of neighborhood opposition	<b>0.05</b>	0.00	0.00	By San Francisco standards, Downtown PDA has had relatively little opposition to development. However, San Francisco is regarded as politically challenging by many developers, and some recent history of placing key projects on the ballot may be a deterrent where plans/EIRs not in place.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.40</b>	<b>0.25</b>	<b>0.10</b>	City indicates 10,484 units built between 2000-2014, including 3,081 from 2011-2014. In both cases, average annual additions are roughly 750 units/year, slightly below pace of 900/year required to achieve allocation.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City indicates that 6,707 units are currently in the pipeline in this PDA.	
		3	General Market Conditions	0.00	0.00	0.00	Very high housing prices, proven market for multifamily and rental as well as for-sale units. Strength of employment market and new Central Subway also represent major advantages.	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.05</b>	0.00	Greatest challenge is in displacement of existing uses, as virtually all development will occur on built sites. High achievable prices assist with this challenge, and eventually should overcome issues regarding existing building's values. Allowable densities are not generally as high as in Transit Center District Plan, so this is more of an issue for this area than that one.	

**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	<b>0.05</b>	<b>0.10</b>	Tight urban environment has relatively small parcels, constraining development scale and making assembly challenging. Only 32 of 157 pipeline projects in 2010 had over 100 units, which is a typical target for large-scale housing builders. But San Francisco has a history of redeveloping small sites, enabled by market values as well as low parking requirements and market acceptance of small units.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	Tenderloin and Mid-Market social issues once represented a concern, but these have proven to no longer be a major deterrent to new development in those areas or the larger area.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	<b>0.05</b>	<b>0.05</b>	PDA is very urban and primarily built-out. City is not aware of major sewer/water issues, but transportation improvements would be required to accommodate substantial new growth. 2010 survey identified \$430M in transportation-related costs, including Van Ness and Geary BRT, Embarcadero and Montgomery BART station improvements, etc. Marginal growth can certainly occur without these major improvements, but substantial additions would likely trigger need. Central Subway, currently underway, should address some needs.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	City has transit sustainability development fee that includes transit, traffic calming, bike/ped facilities. Other Citywide fees apply also, and Rincon Hill area has its own impact fee schedule as well.	
		3	PDA financing capacity	0.00	0.00	<b>0.05</b>	Prices are high enough to support significant contributions to infrastructure financing. For example, \$430M infrastructure cost represents <6% of 15,000 units at \$500,000 each. Major transit capacity improvements will likely require external funding.	

**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	25,423				City indicates 25,423 under current zoning, including 3,081 units already delivered 2011-2014, 6,707 in the pipeline, and 15,635 on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				27,140	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,717)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	10%	20%	Plans for PDA include Downtown Plan (1980s), Van Ness Area Plan (1980s), Rincon Hill Plan (2005), Chinatown, Civic Center, Northeast Waterfront Plan, Central Corridors Plan (to be done in next couple years, with potential upzoning). City has shown history of successful upzoning around Downtown (e.g. Rincon Hill and TCDP).  <i>In amended scenario, EPS assumes some current soft sites will be redeveloped prior to future upzoning, while other sites will become "soft" when allowable densities are increased.</i>
		5	Estimated gross housing capacity at each period		25,423	27,965	30,508	
		6	Sum of Capacity Constraint Coefficients		0.55	0.45	0.20	Major growth requires redevelopment of existing uses on many very small lots, and soft site inventory does not appear to support level of growth allocated. Longer-term challenge includes need for major circulation improvements to facilitate growth, though values can support substantial costs.
			<i>Planning and Entitlement Criteria</i>		0.00	0.05	0.05	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.35	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.05	0.00	
		7	EPS estimate of housing production given constraints		11,440	15,381	24,406	
		8	Percentage of PDA 2040 housing allocation accommodated		42.2%	56.7%	89.9%	Market is very strong but physical capacity of sites individually and in aggregate represents a constraint on development that is likely to worsen over time.
		Summary		Market is very strong and policies are generally supportive of housing intensification, though some portions of PDA will benefit from further planning and environmental clearance than has occurred to date. General infrastructure needs appear supportable due to high unit values, though major transit capacity increases (if necessary) may require external funding sources. Primary constraint on achievable development is the physical capacity of the identified soft sites.  <i>Amended scenario assumes City continues to upzone strategically, secures external funding for major transit capacity needs, and uses restored tools to assemble sites for more viable development.</i>				

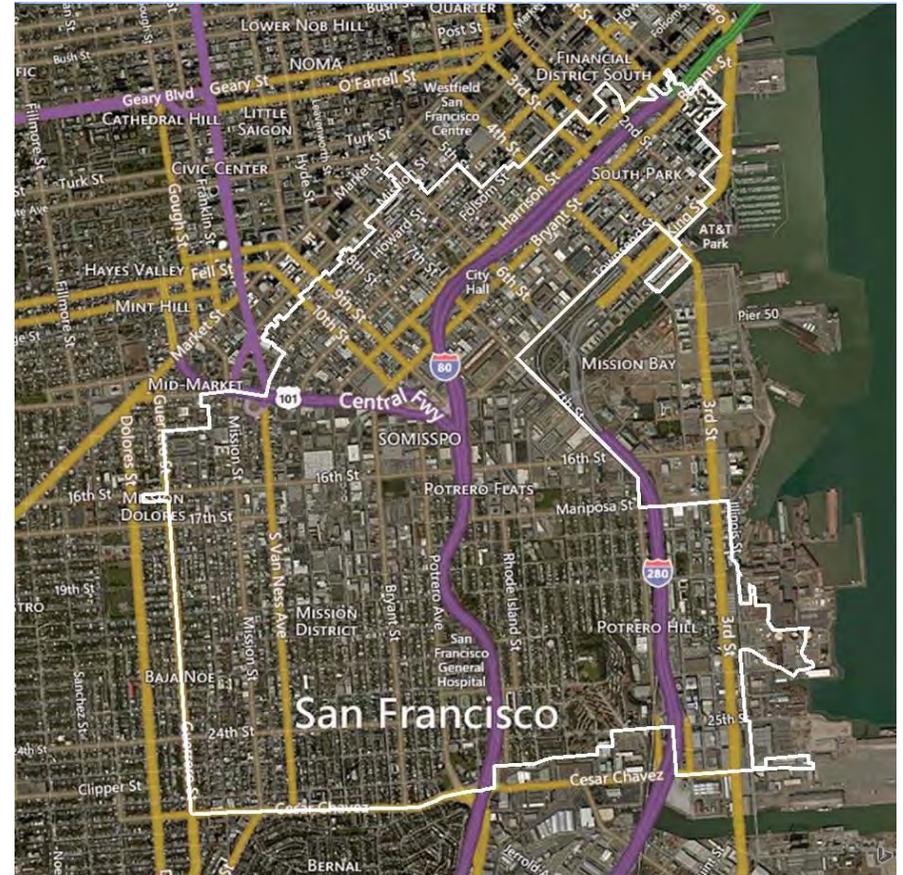
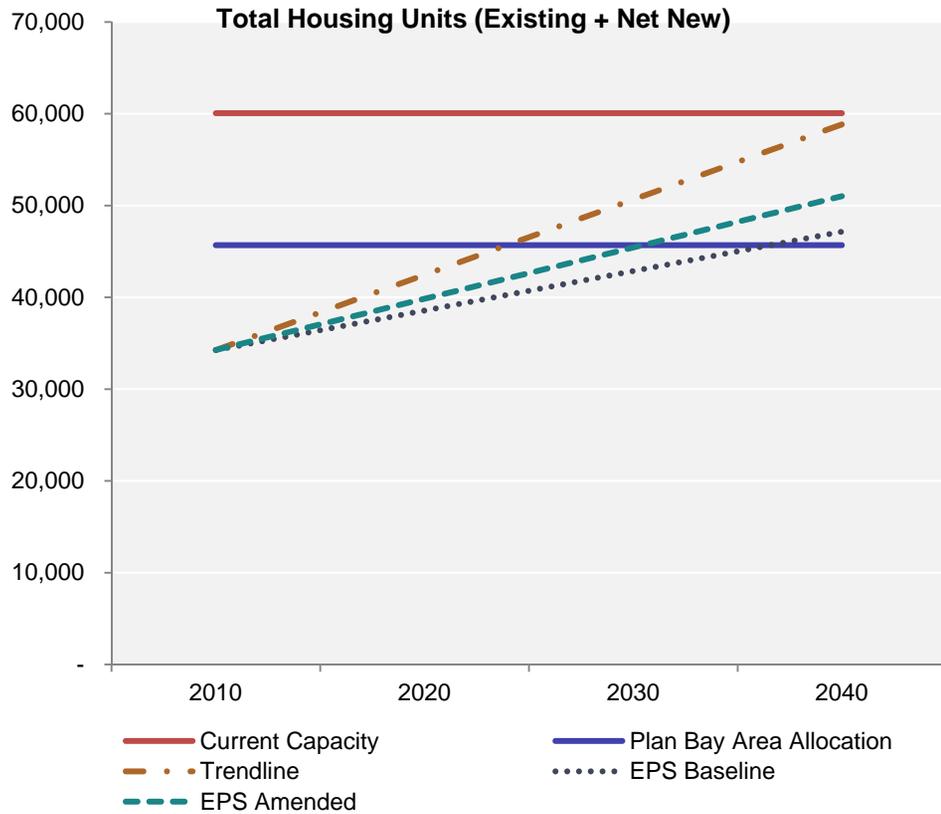
**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Multiple plans and EIRs affect this area (Central SOMA, Downtown, Rincon Hill, Van Ness, etc.), though not all portions of PDA are covered under existing plans, and more are planned for the future.
		2	Displacement of existing stable residential neighborhoods		0.00	<b>0.05</b>	<b>0.05</b>	All of PDA is very urban, mixed-use, dynamic, and projected capacity reflects underutilized sites only, though some may be in residential use today. San Francisco has a history of requiring special assistance for displaced residents.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Board is generally supportive of housing intensification in the core areas, and has upzoned certain sites (like the "5M" site) to accommodate more housing. The Mayor has forwarded an aggressive plan to increase housing production throughout the City.
		2	History of neighborhood opposition		<b>0.05</b>	0.00	0.00	By San Francisco standards, Downtown PDA has had relatively little opposition to development. However, San Francisco is regarded as politically challenging by many developers, and some recent history of placing key projects on the ballot may be a deterrent where plans/EIRs not in place.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.40</b>	<b>0.25</b>	<b>0.10</b>	City indicates 10,484 units built between 2000-2014, including 3,081 from 2011-2014. In both cases, average annual additions are roughly 750 units/year.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates that 6,707 units are currently in the pipeline in this PDA.
		3	General Market Conditions		0.00	0.00	0.00	Very high housing prices, proven market for multifamily and rental as well as for-sale units. Strength of employment market and new Central Subway also represent major advantages.
		4	Financial Feasibility Constraint		<b>0.10</b>	<b>0.05</b>	0.00	Greatest challenge is in displacement of existing uses, as virtually all development will occur on built sites. High achievable prices assist with this challenge, and eventually should overcome issues regarding existing building's values. Allowable densities are not generally as high as in Transit Center District Plan, so this is more of an issue for this area than that one.

**Table A-40. San Francisco: Downtown-Van Ness-Geary**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	Market and Investment Attractiveness (continued)	5	Parcel size and configuration	0.00	0.05	0.05	<p>Tight urban environment has relatively small parcels, constraining development scale and making assembly challenging. Only 32 of 157 pipeline projects in 2010 had over 100 units, which is a typical target for large-scale housing builders. But San Francisco has a history of redeveloping small sites, enabled by market values as well as low parking requirements and market acceptance of small units.</p> <p>Amended scenario assumes restoration of parcel assembly tools helps this constraint.</p>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	<p>Tenderloin and Mid-Market social issues once represented a concern, but these have proven to no longer be a major deterrent to new development in those areas or the larger area.</p>	
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity	0.00	0.05	0.00	<p>PDA is very urban and primarily built-out. City is not aware of major sewer/water issues, but transportation improvements would be required to accommodate substantial new growth. 2010 survey identified \$430M in transportation-related costs, including Van Ness and Geary BRT, Embarcadero and Montgomery BART station improvements, etc. Marginal growth can certainly occur without these major improvements, but substantial additions would likely trigger need. Central Subway, currently underway, should address some needs.</p> <p>Amended scenario assumes external funding addresses these capacity constraints.</p>	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	<p>City has transit sustainability development fee that includes transit, traffic calming, bike/ped facilities. Other Citywide fees apply also, and Rincon Hill area has its own impact fee schedule as well.</p>	
		3	PDA financing capacity	0.00	0.00	0.00	<p>Prices are high enough to support significant contributions to infrastructure financing. For example, \$430M infrastructure cost represents &lt;6% of 15,000 units at \$500,000 each. Major transit capacity improvements will likely require external funding.</p> <p>Amended scenario assumes external funding addresses these capacity constraints.</p>	

# San Francisco: Eastern Neighborhood



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
11,420	25,786	12,893	113%	Transit capacity increases desired	16,761	147%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-41. San Francisco: Eastern Neighborhoods**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	25,786				Eastern Neighborhoods "EN Trips" study (2011) indicates area is planned for 10,000 new housing units. However, City indicates physical capacity for 25,786 units, including 1,583 built 2011-2014, 8,277 in the current pipeline, and 15,926 possible on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				11,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	14,366				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Relatively recent plans and aggressive density allowances suggest it is improbable that major density increases will be pursued in the planning horizon.
		5	Estimated gross housing capacity at each period		25,786	25,786	25,786	
		6	Sum of Capacity Constraint Coefficients		0.75	0.60	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.65	0.50	0.35	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.10	0.15	
		7	EPS estimate of housing production given constraints		6,447	10,314	12,893	
		8	Percentage of PDA 2040 housing allocation accommodated		56.4%	90.3%	112.9%	
			Summary	This PDA is a very strong housing market near a growing employment area, and achieving its allocation would require less annual development than has been achieved over the past 15 years. Some assistance with site assembly and infrastructure financing could facilitate still more growth.				

**Table A-41. San Francisco: Eastern Neighborhoods**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Eastern Neighborhoods Area Plan and EIR adopted in 2008.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Plans do not require displacement of existing residential to achieve buildout
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Significant numbers of housing units have been approved, virtually all multifamily, and the Mayor has promoted an aggressive program to increase housing supply throughout the City.
		2	History of neighborhood opposition		0.05	0.00	0.00	Activists in some neighborhoods have expressed concern regarding gentrification, and some are seeking a ballot measure for a moratorium on market-rate housing in the Mission district.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.65	0.45	0.25	City indicates that 7,787 units have been built from 2000-2014, averaging just over 500 units/year. At this pace, this PDA would reach its allocation in around 2032.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates there are currently 8,277 units already in the pipeline for this PDA.
		3	General Market Conditions		0.00	0.00	0.00	Very strong market for housing and jobs.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Few true vacant sites, but very high achievable unit values make redevelopment of existing lower-scale commercial and industrial uses generally feasible. Most feasible sites likely to be developed first, but over time additional existing uses are likely to near the end of their useful life, making redevelopment of currently stronger existing uses viable in the future.

**Table A-41. San Francisco: Eastern Neighborhoods**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.05	0.10	Tight urban environment has relatively small parcels, constraining development scale and making assembly challenging. But San Francisco has a history of redeveloping small sites, enabled by market values as well as low parking requirements and market acceptance of small units. Issue may be an increasing concern over time as best sites are developed earliest.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted -- very strong market for high-end development.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.05	Primary long-term need is enhanced transit capacity to accommodate added residents. Otherwise, infrastructure is generally in place or can be handled through project-based contributions and/or impact fees.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	In addition to Citywide fees, Eastern Neighborhoods has special impact fees for streets and open space. Citizens Advisory Committee guides expenditure of fees on priority projects.
		3	PDA financing capacity		0.00	0.05	0.10	High achievable unit values makes typical fees and contributions reasonable and supportable. More expensive major upgrades to transit capacity will likely require external funding, but local and inter-governmental funding may be available for such improvements. Scoring assumes capacity issue becomes more problematic over time, and requires new funding sources.

**Table A-41. San Francisco: Eastern Neighborhoods**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	25,786				Eastern Neighborhoods "EN Trips" study (2011) indicates area is planned for 10,000 new housing units. However, City indicates physical capacity for 25,786 units, including 1,583 built 2011-2014, 8,277 in the current pipeline, and 15,926 possible on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				11,420	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	14,366				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Relatively recent plans and aggressive density allowances suggest it is improbable that major density increases will be pursued in the planning horizon.
		5	Estimated gross housing capacity at each period		25,786	25,786	25,786	
		6	Sum of Capacity Constraint Coefficients		0.75	0.60	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.05	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.65	0.50	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.10	0.05	
		7	EPS estimate of housing production given constraints		6,447	10,314	16,761	
		8	Percentage of PDA 2040 housing allocation accommodated		56.4%	90.3%	146.8%	
			Summary	This PDA is a very strong housing market near a growing employment area, and achieving its allocation would require less annual development than has been achieved over the past 15 years.				
				<b>Amended scenario assumes assistance with site assembly and infrastructure financing could facilitate still more growth.</b>				

**Table A-41. San Francisco: Eastern Neighborhoods**

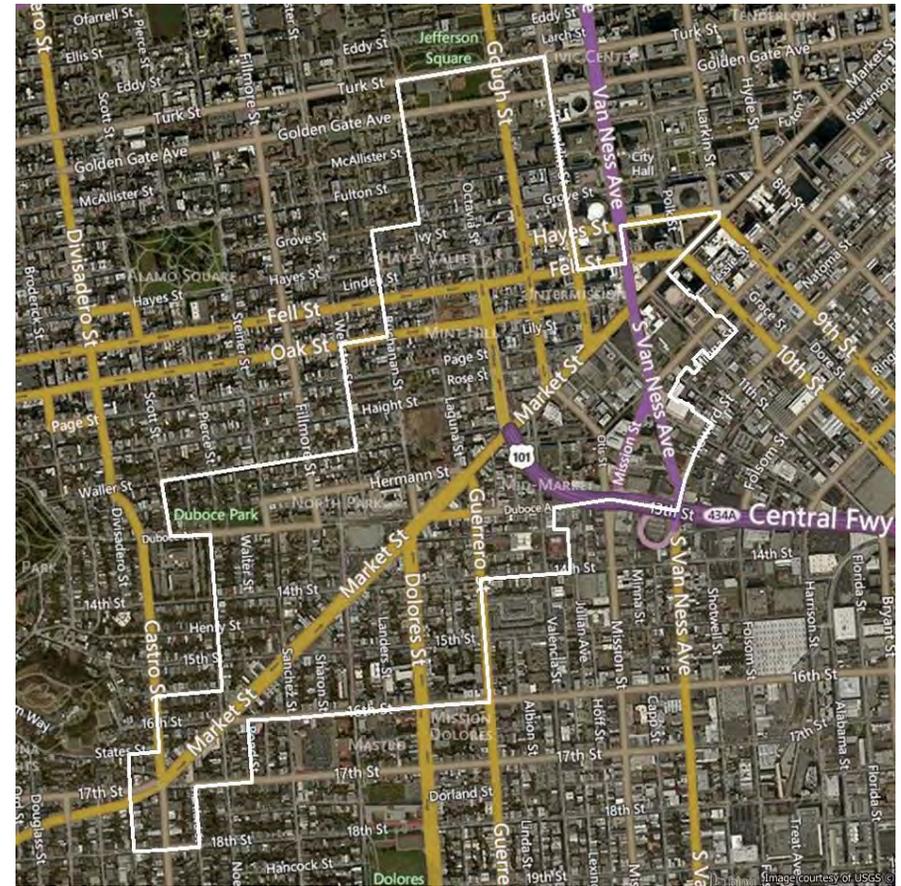
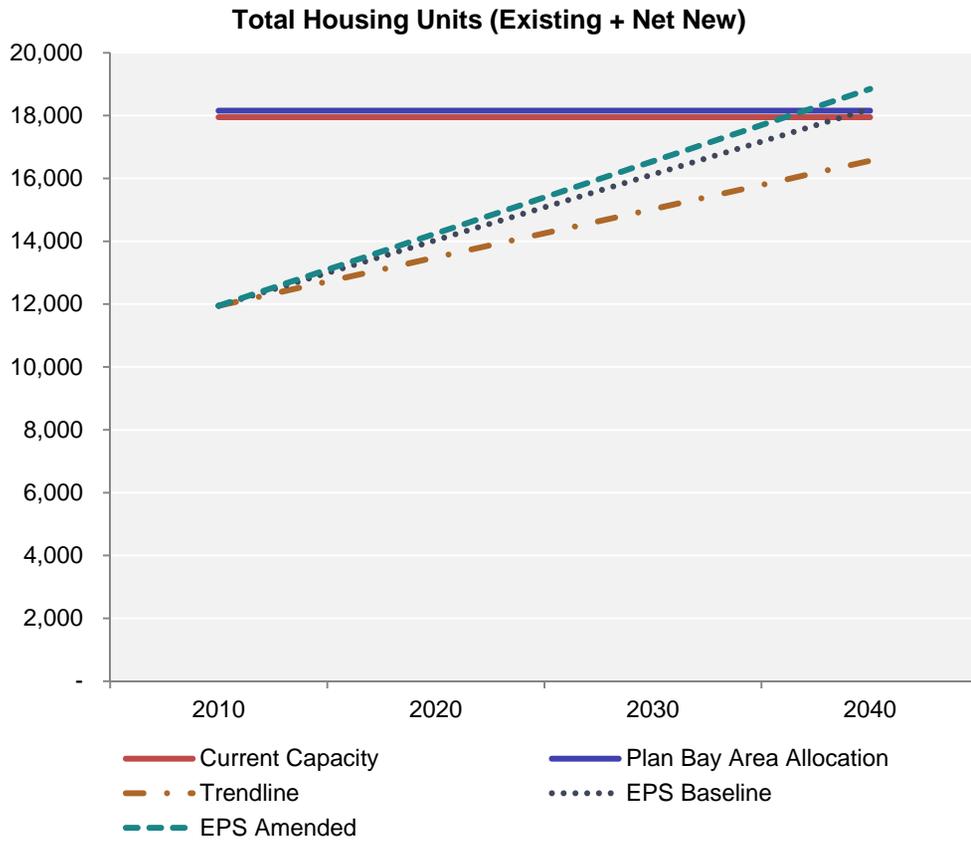
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Eastern Neighborhoods Area Plan and EIR adopted in 2008.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Plans do not require displacement of existing residential to achieve buildout
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Significant numbers of housing units have been approved, virtually all multifamily, and the Mayor has promoted an aggressive program to increase housing supply throughout the City.
		2	History of neighborhood opposition		0.05	0.00	0.00	Activists in some neighborhoods have expressed concern regarding gentrification, and some are seeking a ballot measure for a moratorium on market-rate housing in the Mission district.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.65	0.45	0.25	City indicates that 7,787 units have been built from 2000-2014, averaging just over 500 units/year. At this pace, this PDA would reach its allocation in around 2032.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates there are currently 8,277 units already in the pipeline for this PDA.
		3	General Market Conditions		0.00	0.00	0.00	Very strong market for housing and jobs.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Few true vacant sites, but very high achievable unit values make redevelopment of existing lower-scale commercial and industrial uses generally feasible. Most feasible sites likely to be developed first, but over time additional existing uses are likely to near the end of their useful life, making redevelopment of currently stronger existing uses viable in the future.
		5	Parcel size and configuration		0.00	0.05	0.05	Tight urban environment has relatively small parcels, constraining development scale and making assembly challenging. But San Francisco has a history of redeveloping small sites, enabled by market values as well as low parking requirements and market acceptance of small units. Issue may be an increasing concern over time as best sites are developed earliest.

Amended scenario assumes restored site assembly tools can mitigate these issues.

**Table A-41. San Francisco: Eastern Neighborhoods**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		0.00	0.00	0.00	None noted -- very strong market for high-end development.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.05	0.00	Primary long-term need is enhanced transit capacity to accommodate added residents. Otherwise, infrastructure is generally in place or can be handled through project-based contributions and/or impact fees.  <i>Amended scenario assumes external funding addresses these capacity issues.</i>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	In addition to Citywide fees, Eastern Neighborhoods has special impact fees for streets and open space. Citizens Advisory Committee guides expenditure of fees on priority projects.
		3	PDA financing capacity		0.00	0.05	0.05	High achievable unit values makes typical fees and contributions reasonable and supportable. More expensive major upgrades to transit capacity will likely require external funding, but local and inter-governmental funding may be available for such improvements. Scoring assumes capacity issue becomes more problematic over time, and requires new funding sources.  <i>Amended scenario assumes external funding addresses these capacity issues.</i>

# San Francisco: Market & Octavia



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
6,210	6,000	6,270	101%	Infill parcelization	6,900	111%	Some increased zoning capacity and parcel assembly tools

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-42. San Francisco: Market & Octavia**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,000				City indicates EIR allows development of up to 6,000 housing units, including new accessory dwelling units within existing structures. This figure is assumed though City's physical capacity analysis shows potential for 8,553 units, including 946 constructed 2011-2014, 2,734 in current pipeline, and 4,873 on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				6,210	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(210)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	10%	10%	Relatively recent plan with aggressive densities suggest upzoning is unlikely for most of area, but City is starting a refinement plan likely to increase densities for a subarea around Market/Van Ness.
		5	Estimated gross housing capacity at each period		6,000	6,600	6,600	
		6	Sum of Capacity Constraint Coefficients		0.55	0.35	0.05	No major constraints, so pace and scale will be primarily dictated by market demand.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.35	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		2,700	4,290	6,270	
		8	Percentage of PDA 2040 housing allocation accommodated		43.5%	69.1%	101.0%	Expect area will achieve its allocation due to strong demand, supportive policies, and reasonable infrastructure needs.
		Summary		Specific Plan and EIR in place, and supportive of major housing growth. Infrastructure demands appear to be supportable through requirements on new development. Location near major international job center make this a very attractive development area, as evident from recent projects nearby and very high unit values. City is exploring potential for upzoning in a PDA subarea, which may increase capacity beyond that currently planned.				

**Table A-42. San Francisco: Market & Octavia**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	2008 Specific Plan and program EIR adopted; City starting a refinement plan for subarea around Market/Van Ness to increase densities.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Capacity estimate does not assume displacement of residential buildings, though accessory dwelling unit allowances may cause new units to be added within existing residential buildings.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Board of Supervisors has approved Specific Plan/EIR, numerous projects, and exploration of further increasing densities in a PDA subarea.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not a significant issue in this location.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.55	0.35	0.00	City indicates 946 units built from 2011-2014, following Specific Plan adoption. At this pace, this PDA would fulfill allocation before 2040.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates 2,734 units currently in the pipeline.
		3	General Market Conditions		0.00	0.00	0.00	Very strong unit values, income levels, and services/amenities, as well as being well served by transit and near major job centers, including much-improved Mid-Market.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	High unit values make redevelopment of soft sites reasonably feasible.
		5	Parcel size and configuration		0.00	0.00	0.05	Many soft sites are small and may be challenging to redevelop, but San Francisco has a history of achieving high densities on small parcels due to parking regulations and market-acceptable small units.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted.

**Table A-42. San Francisco: Market & Octavia**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.00	0.00	0.00	Area will benefit from improvements to transit service, streets/streetscape, and open space.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Area-specific fee program in place, and generally adequate for expected improvements.
		3	PDA financing capacity		0.00	0.00	0.00	High unit values appear to support infrastructure financing expectations.

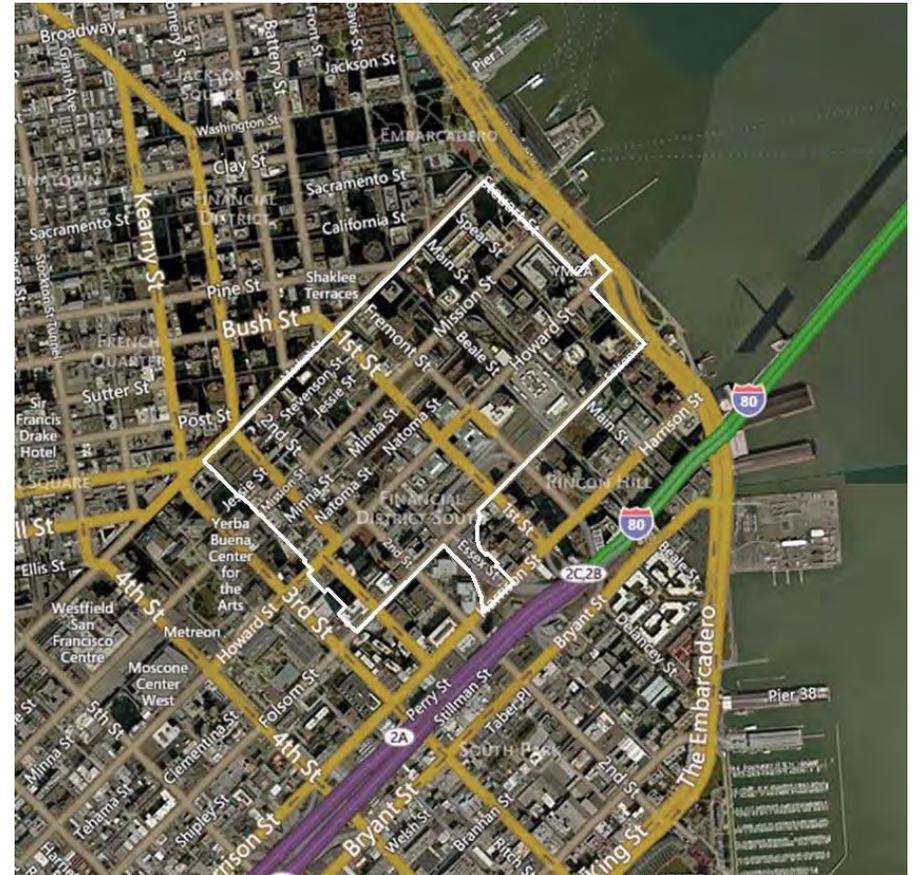
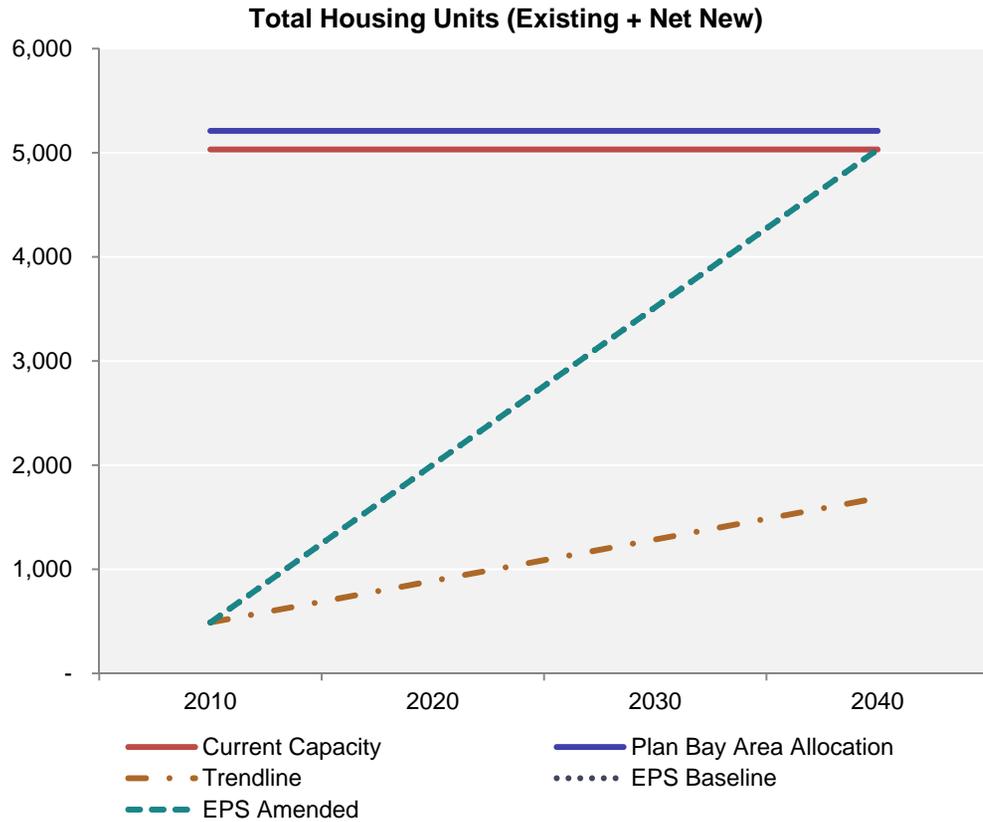
**Table A-42. San Francisco: Market & Octavia**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	6,000				City indicates EIR allows development of up to 6,000 housing units, including new accessory dwelling units within existing structures. This figure is assumed though City's physical capacity analysis shows potential for 8,553 units, including 946 constructed 2011-2014, 2,734 in current pipeline, and 4,873 on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				6,210	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(210)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	10%	15%	Relatively recent plan with aggressive densities suggest upzoning is unlikely for most of area, but City is starting a refinement plan likely to increase densities for a subarea around Market/Van Ness.  <i>Amended scenario assumes slightly higher upzoning than assumed in baseline scenario.</i>
		5	Estimated gross housing capacity at each period		6,000	6,600	6,900	
		6	Sum of Capacity Constraint Coefficients		0.55	0.35	0.00	No major constraints, so pace and scale will be primarily dictated by market demand.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.35	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		2,700	4,290	6,900	
		8	Percentage of PDA 2040 housing allocation accommodated		43.5%	69.1%	111.1%	Expect area will achieve its allocation due to strong demand, supportive policies, and reasonable infrastructure needs.
		Summary		Specific Plan and EIR in place, and supportive of major housing growth. Infrastructure demands appear to be supportable through requirements on new development. Location near major international job center make this a very attractive development area, as evident from recent projects nearby and very high unit values. City is exploring potential for upzoning in a PDA subarea, which may increase capacity beyond that currently planned.  <i>Amended scenario assumes slightly greater upzoning and restoration of parcel assembly tools will increase capacity and yield.</i>				

**Table A-42. San Francisco: Market & Octavia**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	2008 Specific Plan and program EIR adopted; City starting a refinement plan for subarea around Market/Van Ness to increase densities.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Capacity estimate does not assume displacement of residential buildings, though accessory dwelling unit allowances may cause new units to be added within existing residential buildings.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Board of Supervisors has approved Specific Plan/EIR, numerous projects, and exploration of further increasing densities in a PDA subarea.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Not a significant issue in this location.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.55	0.35	0.00	City indicates 946 units built from 2011-2014, following Specific Plan adoption. At this pace, this PDA would fulfill allocation before 2040.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City indicates 2,734 units currently in the pipeline.	
		3	General Market Conditions	0.00	0.00	0.00	Very strong unit values, income levels, and services/amenities, as well as being well served by transit and near major job centers, including much-improved Mid-Market.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	High unit values make redevelopment of soft sites reasonably feasible.	
		5	Parcel size and configuration	0.00	0.00	0.00	Many soft sites are small and may be challenging to redevelop, but San Francisco has a history of achieving high densities on small parcels due to parking regulations and market-acceptable small units.  <i>Amended scenario assumes restored parcel assembly tools can assist with any related issues.</i>	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Area will benefit from improvements to transit service, streets/streetscape, and open space.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Area-specific fee program in place, and generally adequate for expected improvements.	
		3	PDA financing capacity	0.00	0.00	0.00	High unit values appear to support infrastructure financing expectations.	

# San Francisco: Transbay Terminal



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
4,720	4,541	4,541	96%	No major issues noted	4,541	96%	None

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-43. San Francisco: Transbay Terminal**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,541				City indicates capacity for 4,541 units in this PDA, including 127 units already built 2011-2014, 2,516 in the pipeline, and potentially 1,898 more on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				4,720	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(179)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recently upzoned significantly, so no further upzoning expected.
		5	Estimated gross housing capacity at each period		4,541	4,541	4,541	
		6	Sum of Capacity Constraint Coefficients		0.60	0.30	0.00	No major constraints, so pace and scale will be primarily dictated by market demand.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.30	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,816	3,179	4,541	
		8	Percentage of PDA 2040 housing allocation accommodated		38.5%	67.3%	96.2%	Expect area will achieve its allocation due to strong demand, supportive policies, and reasonable infrastructure needs.
		<b>Summary</b>		Specific Plan and EIR in place, and supportive of major housing growth. Infrastructure demands appear to be supportable through requirements on new development. Location near major international job center and super-regional transit hub make this a very attractive development area, as evident from recent projects nearby and very high unit values.				

**Table A-43. San Francisco: Transbay Terminal**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Redevelopment plan adopted in 2005, Transit Center District Plan and EIR adopted in 2012	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No displacement planned or required	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	TCDP plan involves major increases to existing densities, and housing intensification has been occurring throughout the City.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No significant opposition in these areas, which are far from traditional neighborhoods but near other high-rise residential.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.60	0.30	0.00	City indicates 1,156 units built between 2000-2014. While this pace would not reach the full allocation, the recently adopted plans and construction of the multimodal terminal will improve the pace of absorption.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City indicates that 2,516 units are currently in the development pipeline, representing more than half of the allocated units.	
		3	General Market Conditions	0.00	0.00	0.00	Extremely strong with high incomes/unit values and strong job market, plus amenities and services of Downtown San Francisco as well as major transit hub.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Strong market has proven adequate to support new development, even where previous uses were yielding positive cash flows.	

**Table A-43. San Francisco: Transbay Terminal**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Parcels planned for development are adequate for new construction.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted -- very strong market for high-end development.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Transit, streets/streetscape, and open space improvements all part of the plans.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Infrastructure funding appears to be in place through TIF, Mello-Roos, land sale revenue, and impact fees, plus federal dollars for Terminal.
		3	PDA financing capacity		0.00	0.00	0.00	High property values should be adequate to fund expected infrastructure.

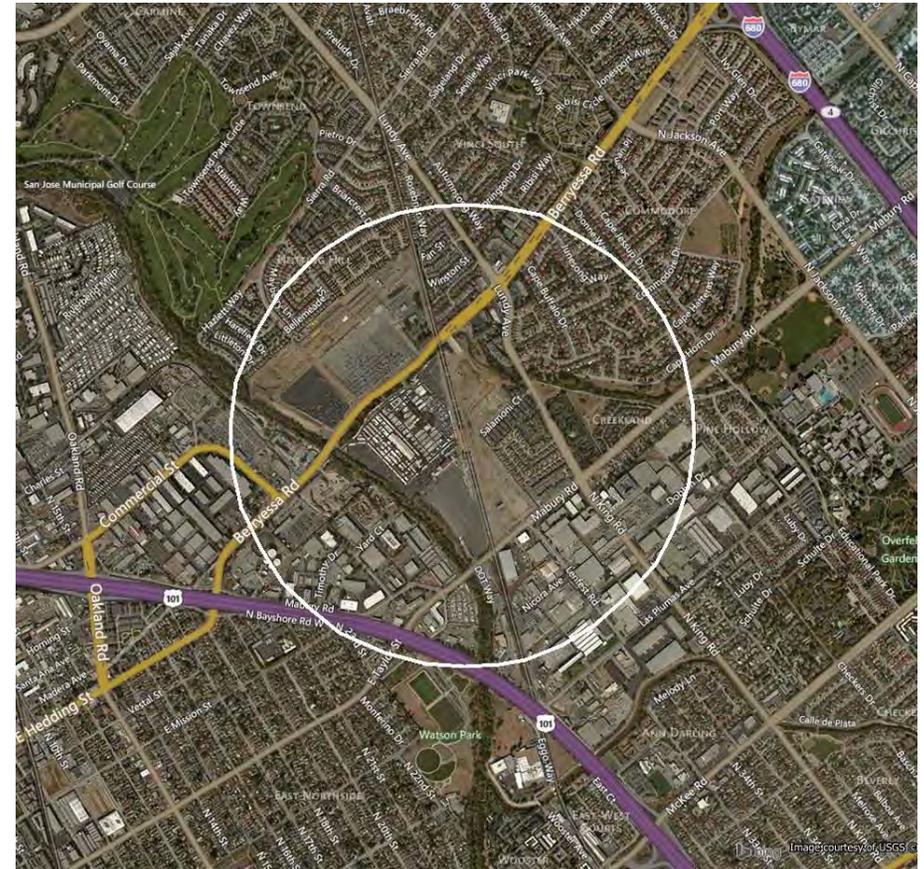
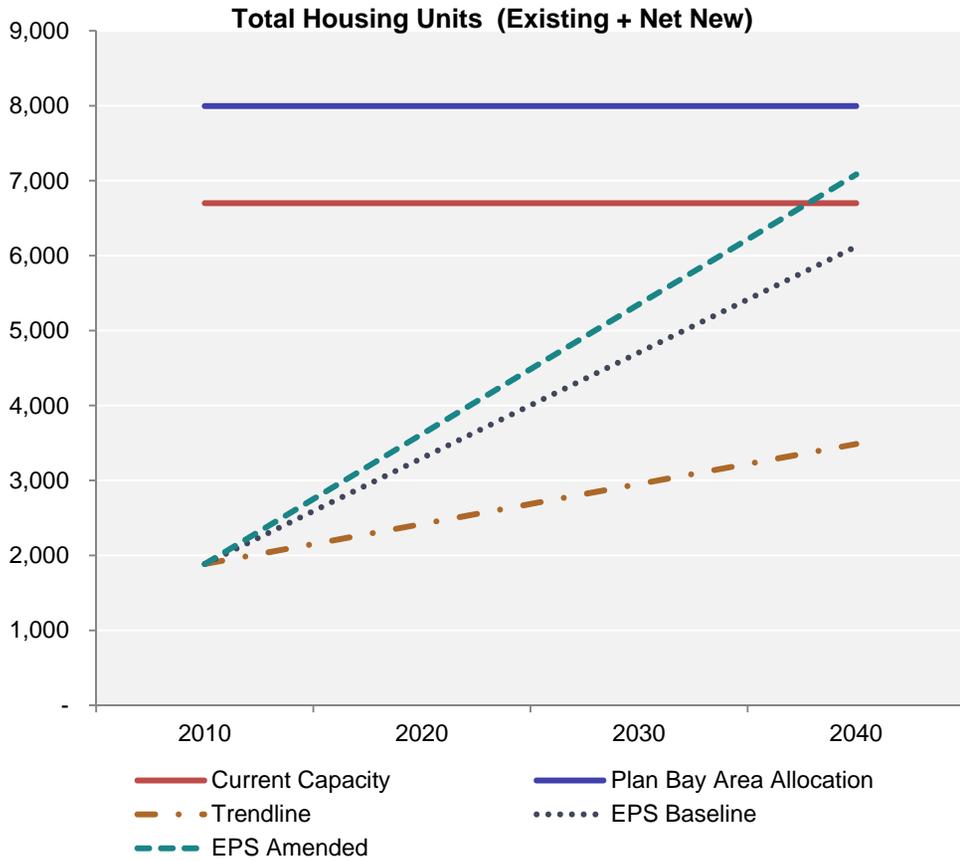
**Table A-43. San Francisco: Transbay Terminal**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,541				City indicates capacity for 4,541 units in this PDA, including 127 units already built 2011-2014, 2,516 in the pipeline, and potentially 1,898 more on soft sites under current zoning.
		2	<i>Plan Bay Area</i> new housing allocation				4,720	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(179)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recently upzoned significantly, so no further upzoning expected.
		5	Estimated gross housing capacity at each period		4,541	4,541	4,541	
		6	Sum of Capacity Constraint Coefficients		0.60	0.30	0.00	No major constraints, so pace and scale will be primarily dictated by market demand.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.30	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,816	3,179	4,541	
		8	Percentage of PDA 2040 housing allocation accommodated		38.5%	67.3%	96.2%	Expect area will achieve its allocation due to strong demand, supportive policies, and reasonable infrastructure needs.
			<b>Summary</b>	<p>Specific Plan and EIR in place, and supportive of major housing growth. Infrastructure demands appear to be supportable through requirements on new development. Location near major international job center and super-regional transit hub make this a very attractive development area, as evident from recent projects nearby and very high unit values.</p> <p style="color: red;">No adjustments were made in the amended scenarios for this PDA.</p>				

**Table A-43. San Francisco: Transbay Terminal**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Redevelopment plan adopted in 2005, Transit Center District Plan and EIR adopted in 2012	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No displacement planned or required	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	TCDP plan involves major increases to existing densities, and housing intensification has been occurring throughout the City.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No significant opposition in these areas, which are far from traditional neighborhoods but near other high-rise residential.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.60	0.30	0.00	City indicates 1,156 units built between 2000-2014. While this pace would not reach the full allocation, the recently adopted plans and construction of the multimodal terminal will improve the pace of absorption.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City indicates that 2,516 units are currently in the development pipeline, representing more than half of the allocated units.	
		3	General Market Conditions	0.00	0.00	0.00	Extremely strong with high incomes/unit values and strong job market, plus amenities and services of Downtown San Francisco as well as major transit hub.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Strong market has proven adequate to support new development, even where previous uses were yielding positive cash flows.	
		5	Parcel size and configuration	0.00	0.00	0.00	Parcels planned for development are adequate for new construction.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted -- very strong market for high-end development.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Transit, streets/streetscape, and open space improvements all part of the plans.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Infrastructure funding appears to be in place through TIF, Mello-Roos, land sale revenue, and impact fees, plus federal dollars for Terminal.	
		3	PDA financing capacity	0.00	0.00	0.00	High property values should be adequate to fund expected infrastructure.	

# San Jose: Berryessa Station



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
6,110	4,814	4,236	69%	Existing use, infrastructure needs, and market preference for lower density	5,199	85%	Upzoning for greater density and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-44. San Jose: Berryessa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,814				Allowable development per City staff, including Flea Market site (3900 DUs) and other sites ranging from townhomes to apartments up to 90 DU/acre
		2	<i>Plan Bay Area</i> new housing allocation				6,110	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,296)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	5%	10%	City has expressed interest in increasing density on this site to take advantage of planned BART service and be consistent with Envision San Jose. EPS assumes a modest density increase.
		5	Estimated gross housing capacity at each period		4,814	5,055	5,295	
		6	Sum of Capacity Constraint Coefficients		0.80	0.30	0.20	Primary long-term constraint is expected need for improvements to Hwy 101 interchange, for which funding is not yet secured.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.80	0.30	0.10	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.10	
		7	EPS estimate of housing production given constraints		963	3,538	4,236	
		8	Percentage of PDA 2040 housing allocation accommodated		15.8%	57.9%	69.3%	
			<b>Summary</b>	Strong residential market will be buoyed by coming BART service, and policies are in place to support and even increase allowable densities. Phasing out of Flea Market on primary development site and need for in-tract infrastructure will curb pace of growth in early period, and Hwy 101 interchange improvements that are not yet funded may curb pace of growth in later years as capacity is strained.				

**Table A-44. San Jose: Berryessa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Family owners successfully rezoned Flea Market for 3900 units (including EIR in 2007), but City now desires more density and has option to increase minimum densities if development does not proceed by a certain date.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Not required for planned density.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City supports redevelopment and has expressed interest in more density through Envision San Jose process.
		2	History of neighborhood opposition		0.00	0.00	0.00	Community generally supportive of current densities, though additional density may generate more opposition. EPS has assumed modest density increase and thus no discount for community opposition.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.60	0.30	0.10	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, roughly 1,000 units have been built since 2000, including 557 since 2010. Overall average in PDA since 2010 has been roughly 100 units/year, roughly half of absorption pace required to achieve allocated growth through 2040. However, primary development site (Flea Market) has mostly not been available for development during that time period, so future development pace will likely increase as that use is phased out. EPS assumes Flea Market site becomes available around 2020, though this is not certain.
		2	Recent Local Development Activity (pipeline)		0.20	0.00	0.00	City reports that 724 units are in the pipeline in this PDA, a small proportion of the amount envisioned for the area. This constrains achievable production in the early period.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.

**Table A-44. San Jose: Berryessa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		4	Financial Feasibility Constraint		0.00	0.00	0.00	Site development should be feasible given reasonable infrastructure burdens and high home values, buoyed by expected BART service.
		5	Parcel size and configuration		0.00	0.00	0.00	Primary parcels are large and regularly configured.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.00	0.00	0.00	In-tract infrastructure required to convert Flea Market site to the planned mixed-use development. Interchange improvements also expected, but not yet funded.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The development plans include developer contributions and/or installation of required infrastructure, other than for improvements to Hwy 101 interchange.
		3	PDA financing capacity		0.00	0.00	0.10	Expect to need external funding sources for Hwy 101 interchange improvements. Discount assumes funds required in later years, but sources not yet identified.

**Table A-44. San Jose: Berryessa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,814				Allowable development per City staff, including Flea Market site (3900 DUs) and other sites ranging from townhomes to apartments up to 90 DU/acre
		2	<i>Plan Bay Area</i> new housing allocation				6,110	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,296)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	10%	20%	City has expressed interest in increasing density on this site to take advantage of planned BART service and be consistent with Envision San Jose.  <b>Amended scenario assumes a more aggressive upzoning than in baseline scenario.</b>
		5	Estimated gross housing capacity at each period		4,814	5,295	5,777	
		6	Sum of Capacity Constraint Coefficients		0.80	0.30	0.10	Primary long-term constraint is expected need for improvements to Hwy 101 interchange, for which funding is not yet secured.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.80	0.30	0.10	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		963	3,707	5,199	
		8	Percentage of PDA 2040 housing allocation accommodated		15.8%	60.7%	85.1%	
			Summary	Strong residential market will be buoyed by coming BART service, and policies are in place to support and even increase allowable densities. Phasing out of Flea Market on primary development site and need for in-tract infrastructure will curb pace of growth in early period, and Hwy 101 interchange improvements that are not yet funded may curb pace of growth in later years as capacity is strained.  <b>Amended scenario assumes a more aggressive upzoning than in baseline scenario, and external funding is secured for freeway interchange.</b>				

**Table A-44. San Jose: Berryessa Station**

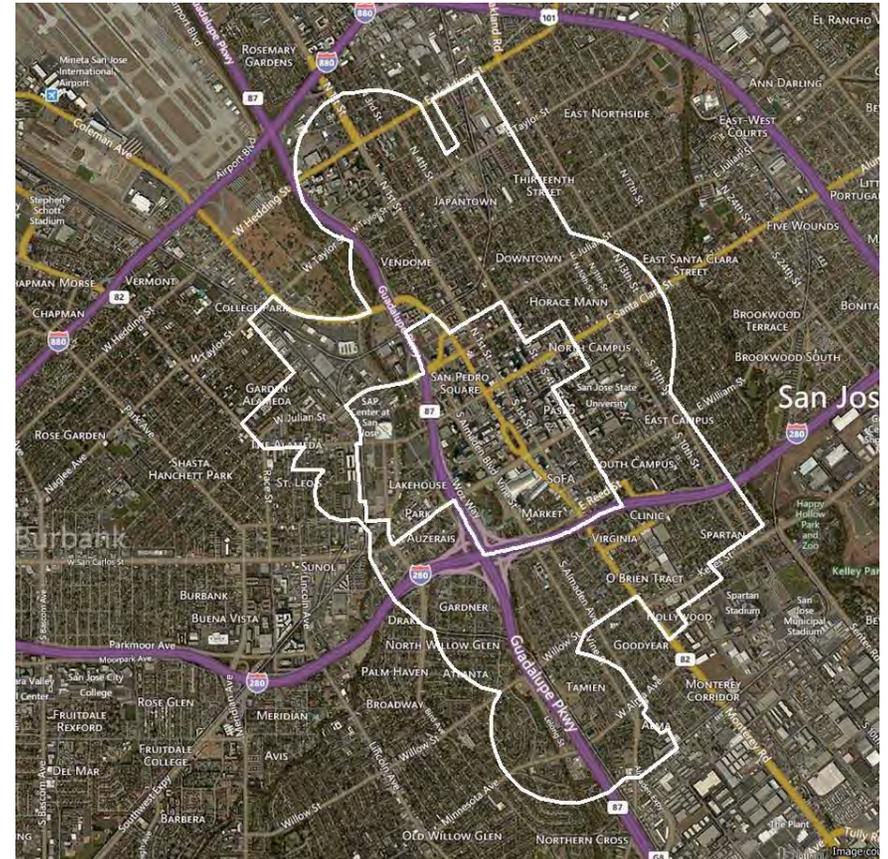
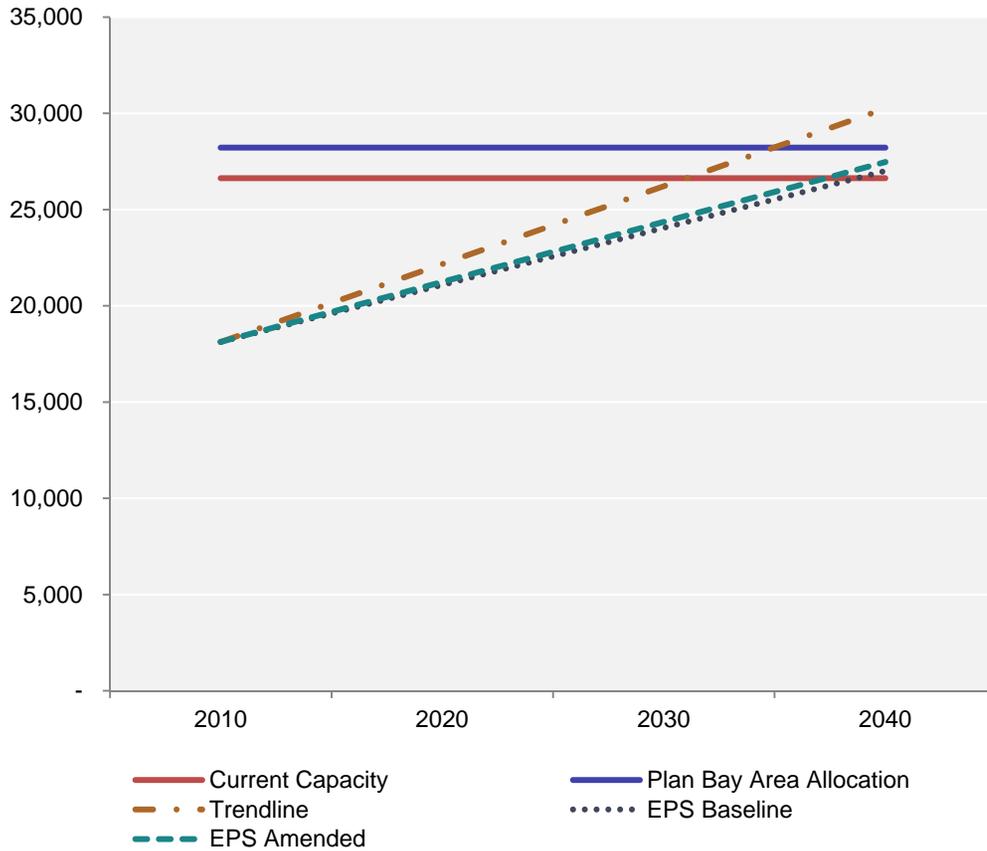
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Family owners successfully rezoned Flea Market for 3900 units (including EIR in 2007), but City now desires more density and has option to increase minimum densities if development does not proceed by a certain date.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Not required for planned density.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City supports redevelopment and has expressed interest in more density through Envision San Jose process.
		2	History of neighborhood opposition		0.00	0.00	0.00	Community generally supportive of current densities, though additional density may generate more opposition. EPS has assumed modest density increase and thus no discount for community opposition.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.60	0.30	0.10	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, roughly 1,000 units have been built since 2000, including 557 since 2010. Overall average in PDA since 2010 has been roughly 100 units/year, roughly half of absorption pace required to achieve allocated growth through 2040. However, primary development site (Flea Market) has mostly not been available for development during that time period, so future development pace will likely increase as that use is phased out. EPS assumes Flea Market site becomes available around 2020, though this is not certain.
		2	Recent Local Development Activity (pipeline)		0.20	0.00	0.00	City reports that 724 units are in the pipeline in this PDA, a small proportion of the amount envisioned for the area. This constrains achievable production in the early period.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.

**Table A-44. San Jose: Berryessa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint		0.00	0.00	0.00	Site development should be feasible given reasonable infrastructure burdens and high home values, buoyed by expected BART service.
		5	Parcel size and configuration		0.00	0.00	0.00	Primary parcels are large and regularly configured.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	In-tract infrastructure required to convert Flea Market site to the planned mixed-use development. Interchange improvements also expected.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	The development plans include developer contributions and/or installation of required infrastructure, other than for improvements to Hwy 101 interchange.
		3	PDA financing capacity		0.00	0.00	0.00	Expect to need external funding sources for Hwy 101 interchange improvements.  <span style="color: red;">Amended scenario assumes external funding secured for this improvement.</span>

# San Jose: Downtown "Frame"

Total Housing Units (Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
10,090	8,500	8,883	88%	Site availability and reliance on higher-density construction	9,350	93%	Parcel assembly tools

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-45. San Jose: Downtown "Frame"**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	8,500				Housing Element identifies 85 acres of opportunity sites, with densities up to 250 DU/acre. Capacity figure assumes average density of 100 units/acre.
		2	<i>Plan Bay Area</i> new housing allocation				10,090	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,590)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	Assumes are will be subject to some modest upzoning over next 25 years.
		5	Estimated gross housing capacity at each period		8,500	8,500	9,350	EPS assumes some upzoning may occur before 2040, to enable this area to capitalize on its market opportunity.
		6	Sum of Capacity Constraint Coefficients		0.70	0.35	0.05	Primary constraint is site availability and capacity, which may be enhanced through longer-term upzoning in this PDA. Infrastructure generally in place or supportable given high achievable unit values, and policies support infill.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.35	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		2,550	5,525	8,883	
		8	Percentage of PDA 2040 housing allocation accommodated		25.3%	54.8%	88.0%	
			<b>Summary</b>	Supportive policies are in place for infill residential, including incentives for high-rises and affordable projects as well as streamlined processing. Multifamily development has also been occurring at a rapid pace and with strong values, roughly as quickly as required to reach PDA allocation. However, the area does not appear to have physical/regulatory capacity to meet the allocated growth without zoning changes, which may be expected over the 30-year horizon.				

**Table A-45. San Jose: Downtown "Frame"**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Multiple Specific Plans and EIRs are in place, as well as policies promoting dense infill development (fee waivers, flexible zoning, streamlined processing, etc.)
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required, as development expected on vacant/parking and low-rise commercial sites.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has adopted numerous policies promoting infill development and approved projects at significant densities.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not an issue in this PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.70	0.35	0.00	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, over 4,900 units have been built since 2000, including over 1,000 since 2010. Overall average in PDA since 2000 has been roughly 300 units/year, similar to absorption pace required to achieve allocated growth through 2040.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates 1,020 units are currently in the pipeline in this PDA, indicating significant investor/developer interest.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.
		4	Financial Feasibility Constraint		0.00	0.00	0.00	Displacing existing uses - even revenue-generating parking lots -- can be a hurdle, but continued growth in achievable unit values should support redevelopment over the long term. However, building at average density of 100+ units/acre may face feasibility challenges. Lower-density product types are both more feasible and proven in the market.

**Table A-45. San Jose: Downtown "Frame"**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.05	Sites are a mix of larger and smaller parcels, some of which may require assembly for redevelopment. Expected to be more problematic in later years, after the most developable sites are used earlier.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives noted, although housing viability would benefit from improved job development in the area and San Jose more broadly.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Infrastructure is generally in place in this urban environment. Onetime plans to expand roadway capacity has been de-prioritized.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Infrastructure needs are modest, and generally met through City's impact fee program. City does have incentives for certain Downtown housing (high-rises and affordable projects) that may reduce net funding available for infrastructure upgrades.
		3	PDA financing capacity		0.00	0.00	0.00	Original plans assumed RDA participation in infrastructure. However, it appears development can proceed without many extraordinary infrastructure investments, so cost burden appears reasonable when market demand is strong enough to spur new development.

**Table A-45. San Jose: Downtown "Frame"**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	8,500				Housing Element identifies 85 acres of opportunity sites, with densities up to 250 DU/acre. Capacity figure assumes average density of 100 units/acre.
		2	<i>Plan Bay Area</i> new housing allocation				10,090	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,590)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	
		5	Estimated gross housing capacity at each period		8,500	8,500	9,350	EPS assumes some upzoning may occur before 2040, to enable this area to capitalize on its market opportunity.
		6	Sum of Capacity Constraint Coefficients		0.70	0.35	0.00	Primary constraint is site availability and capacity, which may be enhanced through longer-term upzoning in this PDA. Infrastructure generally in place or supportable given high achievable unit values, and policies support infill.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.35	0.00	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		2,550	5,525	9,350	
		8	Percentage of PDA 2040 housing allocation accommodated		25.3%	54.8%	92.7%	
			Summary	Supportive policies are in place for infill residential, including incentives for high-rises and affordable projects as well as streamlined processing. Multifamily development has also been occurring at a rapid pace and with strong values, roughly as quickly as required to reach PDA allocation. However, the area does not appear to have physical/regulatory capacity to meet the allocated growth without zoning changes, which may be expected over the 30-year horizon.				
				Amended scenario assumes restored parcel assembly tools can yield slightly higher total housing production than in baseline scenario.				

**Table A-45. San Jose: Downtown "Frame"**

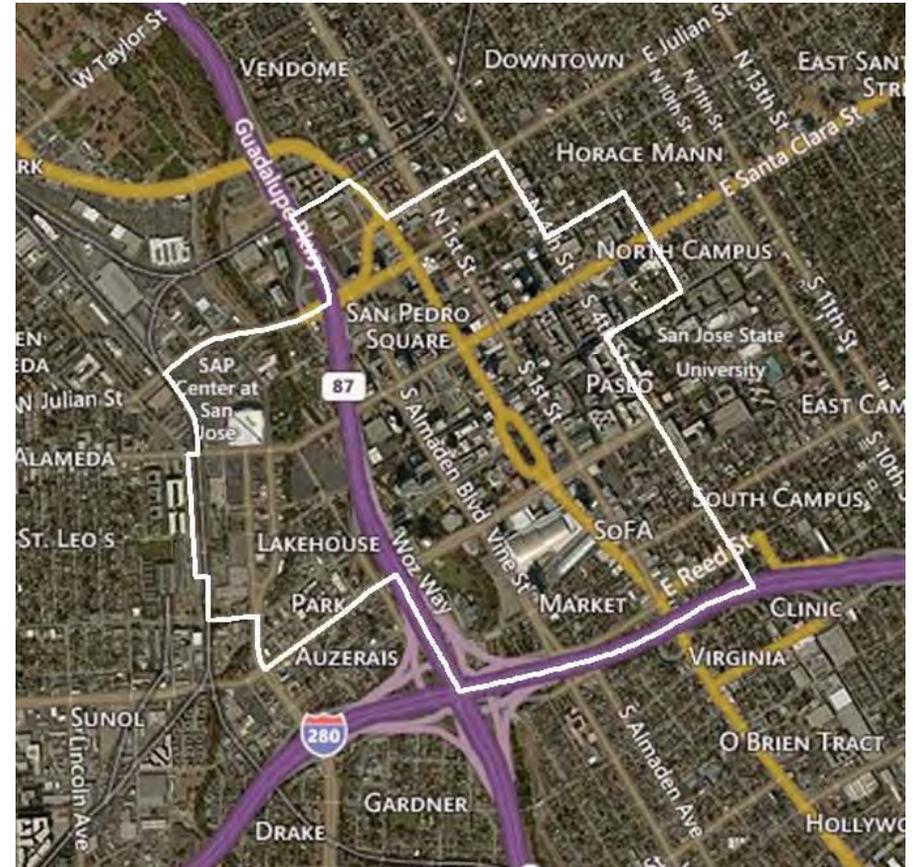
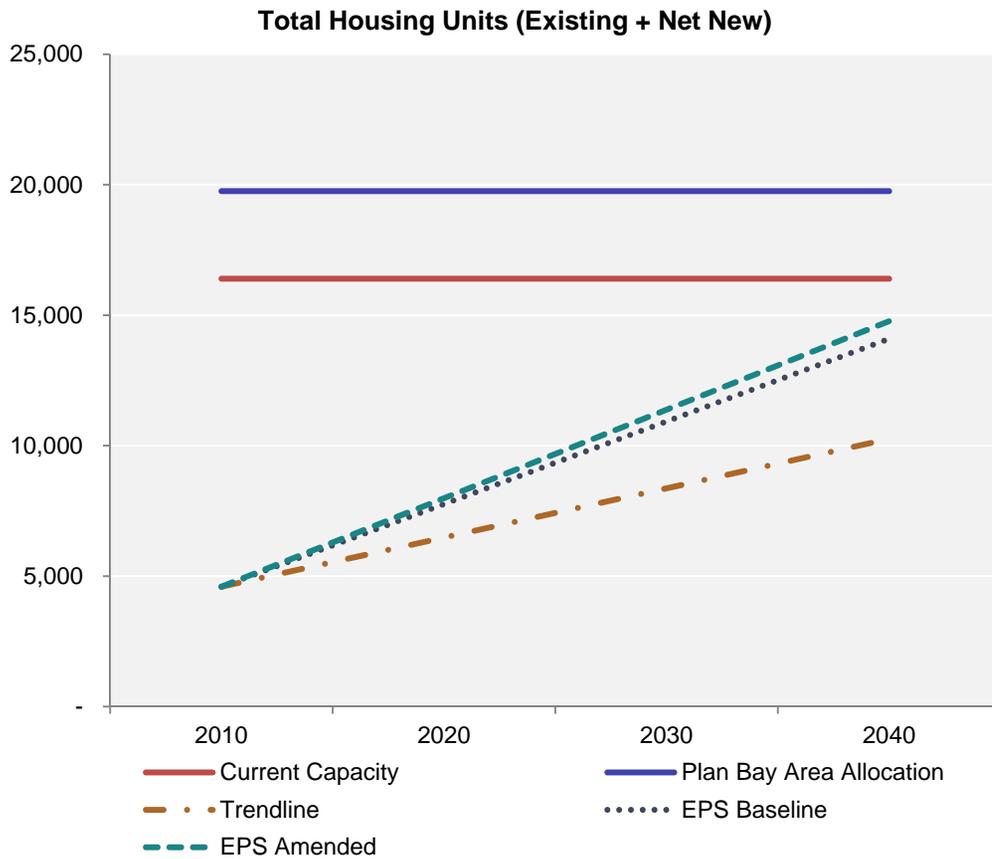
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Multiple Specific Plans and EIRs are in place, as well as policies promoting dense infill development (fee waivers, flexible zoning, streamlined processing, etc.)	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required, as development expected on vacant/parking and low-rise commercial sites.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has adopted numerous policies promoting infill development and approved projects at significant densities.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Not an issue in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.70	0.35	0.00	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, over 4,900 units have been built since 2000, including over 1,000 since 2010. Overall average in PDA since 2000 has been roughly 300 units/year, similar to absorption pace required to achieve allocated growth through 2040.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	City indicates 1,020 units are currently in the pipeline in this PDA, indicating significant investor/developer interest.	
		3	General Market Conditions	0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Displacing existing uses - even revenue-generating parking lots -- can be a hurdle, but continued growth in achievable unit values should support redevelopment over the long term. However, building at average density of 100+ units/acre may face feasibility challenges. Lower-density product types are both more feasible and proven in the market.	
		5	Parcel size and configuration	0.00	0.00	0.00	Sites are a mix of larger and smaller parcels, some of which may require assembly for redevelopment. Expected to be more problematic in later years, after the most developable sites are used earlier.	

Amended scenario assumes restored parcel assembly tools can alleviate this constraint.

**Table A-45. San Jose: Downtown "Frame"**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives noted, although housing viability would benefit from improved job development in the area and San Jose more broadly.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Infrastructure is generally in place in this urban environment. Onetime plans to expand roadway capacity has been de-prioritized.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Infrastructure needs are modest, and generally met through City's impact fee program. City does have incentives for certain Downtown housing (high-rises and affordable projects) that may reduce net funding available for infrastructure upgrades.
		3	PDA financing capacity		0.00	0.00	0.00	Original plans assumed RDA participation in infrastructure. However, it appears development can proceed without many extraordinary infrastructure investments, so cost burden appears reasonable when market demand is strong enough to spur new development.

# San Jose: Greater Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
15,160	11,802	9,501	63%	Site availability and reliance on Type I construction	10,179	67%	Parcel assembly tools

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-46. San Jose: Greater Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	11,802				CD+A identified 66 acres of land with capacity average of 175 units/acre.
		2	<i>Plan Bay Area</i> new housing allocation				15,160	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(3,358)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	15%	Downtown Strategy plan and EIR date from 2000 and may be updated in the planning horizon, potential adding capacity.
		5	Estimated gross housing capacity at each period		11,802	11,802	13,572	
		6	Sum of Capacity Constraint Coefficients		0.75	0.45	0.30	Primary constraint other than site availability is the pace of achievable absorption, which would need to increase substantially from recent levels despite relative success at attracting new housing in the PDA.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.45	0.30	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		2,951	6,491	9,501	
		8	Percentage of PDA 2040 housing allocation accommodated		19.5%	42.8%	62.7%	
		Summary		Supportive policies are in place for infill residential, including incentives for high-rises and affordable projects as well as streamlined processing. Multifamily development has also been occurring at a rapid pace and with strong values, though not as quickly as required to reach PDA allocation. However, the area does not appear to have physical/regulatory capacity to meet the allocated growth without zoning changes, which may be expected over the 30-year horizon.				

**Table A-46. San Jose: Greater Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Multiple Specific Plans and EIRs are in place, as well as policies promoting Downtown development (fee waivers, flexible zoning, streamlined processing, etc.)
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required, as development expected on vacant/parking and low-rise commercial sites.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has adopted numerous policies promoting infill development and approved projects at significant densities.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not an issue in this PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.65	0.35	0.15	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, over 2,800 units have been built since 2000, including nearly 1,200 since 2010. Overall average in PDA since 2000 has been roughly 200 units/year, below the required 500/year required to achieve allocated growth.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates 2,137 units are currently in the pipeline in this PDA, indicating significant investor/developer interest.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Displacing existing uses - even revenue-generating parking lots -- can be a hurdle, but continued growth in achievable unit values should support redevelopment over the long term. However, building at average density of 175+ units/acre requires Type I construction that faces feasibility challenges and depth-of-market issues. Lower-density product types are both more feasible and proven in the market.

**Table A-46. San Jose: Greater Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.05	Sites are a mix of larger and smaller parcels, some of which may require assembly for redevelopment. Expected to be more problematic in later years, after the most developable sites are used earlier.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No major disincentives noted, although housing viability would benefit from improved job development in the area and San Jose more broadly.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	Infrastructure is generally in place in this urban environment. Onetime plans to expand roadway capacity has been de-prioritized.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Infrastructure needs are modest, and generally met through City's impact fee program. City does have incentives for certain Downtown housing (high-rises and affordable projects) that may reduce net funding available for infrastructure upgrades.	
		3	PDA financing capacity	0.00	0.00	0.00	Original plans assumed RDA participation in infrastructure. However, it appears development can proceed without many extraordinary infrastructure investments, so cost burden appears reasonable when market demand is strong enough to spur new development.	

**Table A-46. San Jose: Greater Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	11,802				CD+A identified 66 acres of land with capacity average of 175 units/acre.
		2	Plan Bay Area new housing allocation			15,160		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(3,358)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	15%	Downtown Strategy plan and EIR date from 2000 and may be updated in the planning horizon, potential adding capacity.
		5	Estimated gross housing capacity at each period		11,802	11,802	13,572	
		6	Sum of Capacity Constraint Coefficients		0.75	0.45	0.25	Primary constraint other than site availability is the pace of achievable absorption, which would need to increase substantially from recent levels despite relative success at attracting new housing in the PDA.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.45	0.25	
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00			
7	EPS estimate of housing production given constraints		2,951	6,491	10,179			
8	Percentage of PDA 2040 housing allocation accommodated		19.5%	42.8%	67.1%			
	Summary		Supportive policies are in place for infill residential, including incentives for high-rises and affordable projects as well as streamlined processing. Multifamily development has also been occurring at a rapid pace and with strong values, though not as quickly as required to reach PDA allocation. However, the area does not appear to have physical/regulatory capacity to meet the allocated growth without zoning changes, which may be expected over the 30-year horizon. Also, reliance on Type I construction to achieve allocated growth creates a feasibility challenge, and lower density product types may be more feasible but then reduce achievable buildout figures.					
			Amended scenario assumes restored parcel assembly tools help to alleviate that issue, but not sufficiently to achieve allocated growth.					

**Table A-46. San Jose: Greater Downtown**

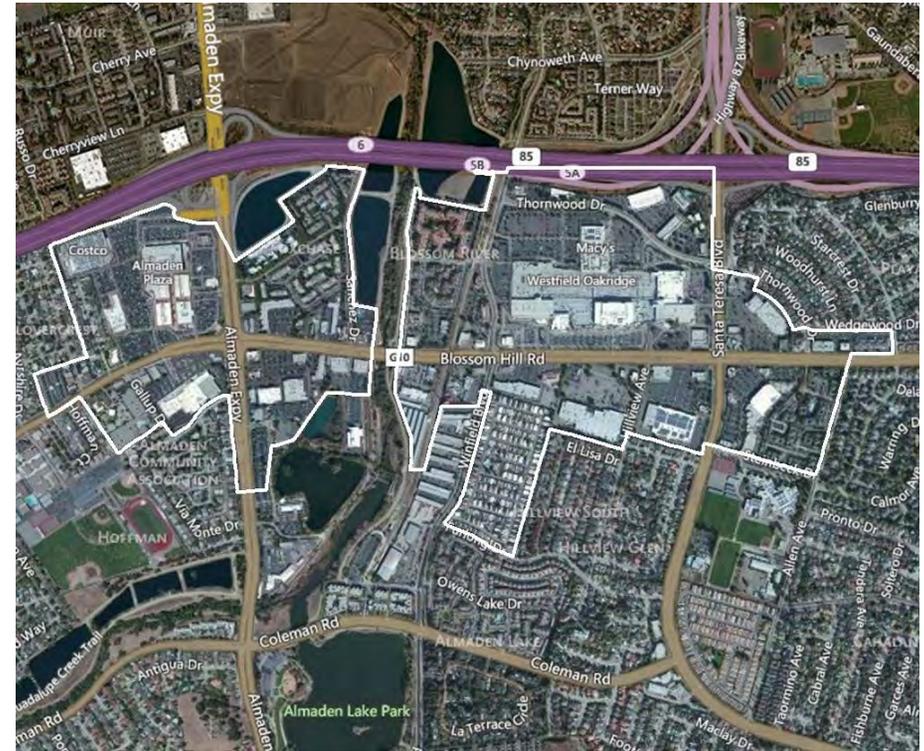
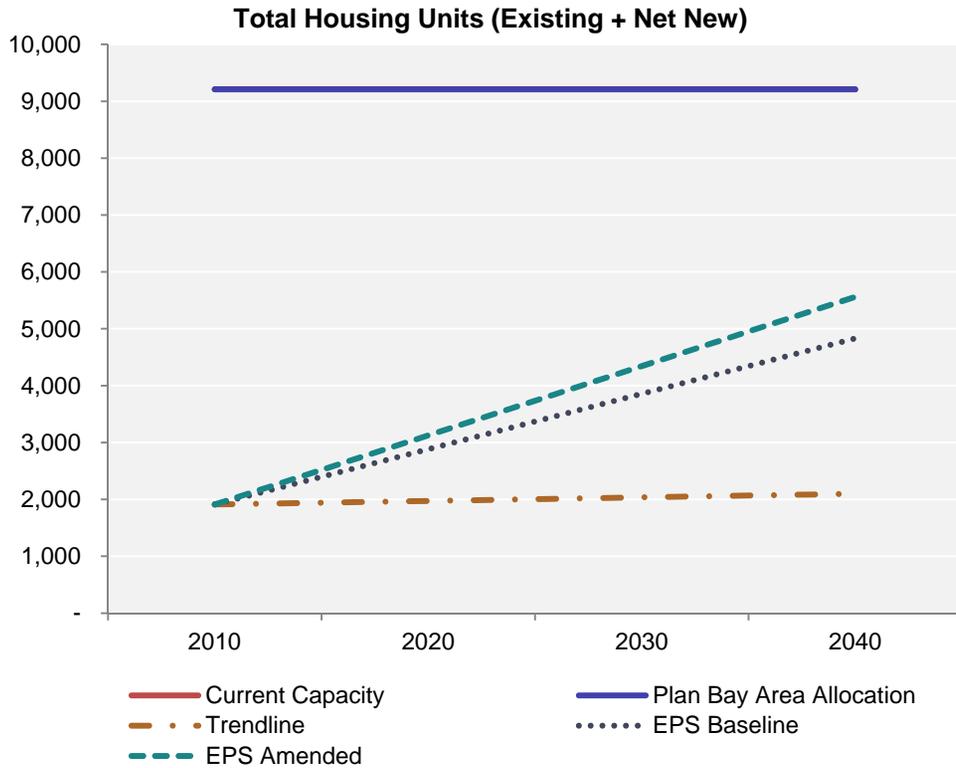
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Multiple Specific Plans and EIRs are in place, as well as policies promoting Downtown development (fee waivers, flexible zoning, streamlined processing, etc.)
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required, as development expected on vacant/parking and low-rise commercial sites.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has adopted numerous policies promoting infill development and approved projects at significant densities.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not an issue in this PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.65	0.35	0.15	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, over 2,800 units have been built since 2000, including nearly 1,200 since 2010. Overall average in PDA since 2000 has been roughly 200 units/year, below the required 500/year required to achieve allocated growth.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	City indicates 2,137 units are currently in the pipeline in this PDA, indicating significant investor/developer interest.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents. Planned BART service extension should enhance long-term value as well.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Displacing existing uses - even revenue-generating parking lots -- can be a hurdle, but continued growth in achievable unit values should support redevelopment over the long term. However, building at average density of 175+ units/acre requires Type I construction that faces feasibility challenges and depth-of-market issues. Lower-density product types are both more feasible and proven in the market.
		5	Parcel size and configuration		0.00	0.00	0.00	Sites are a mix of larger and smaller parcels, some of which may require assembly for redevelopment. Expected to be more problematic in later years, after the most developable sites are used earlier.

Amended scenario assumes restored parcel assembly tools alleviate this constraint.

**Table A-46. San Jose: Greater Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives noted, although housing viability would benefit from improved job development in the area and San Jose more broadly.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Infrastructure is generally in place in this urban environment. Onetime plans to expand roadway capacity has been de-prioritized.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Infrastructure needs are modest, and generally met through City's impact fee program. City does have incentives for certain Downtown housing (high-rises and affordable projects) that may reduce net funding available for infrastructure upgrades.
		3	PDA financing capacity		0.00	0.00	0.00	Original plans assumed RDA participation in infrastructure. However, it appears development can proceed without many extraordinary infrastructure investments, so cost burden appears reasonable when market demand is strong enough to spur new development.

# San Jose: Oakridge/Almaden Plaza Urban Village



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
7,300	7,300	2,920	40%	Viability of existing uses and planning "horizon" constraints	3,650	50%	Relaxation of "horizon" phasing constraint

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	7,300				City of San Jose Urban Village Plans assume 7,300 housing units in this area, though advanced planning has not yet occurred to verify this figure.
		2	<i>Plan Bay Area</i> new housing allocation				7,300	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		7,300	7,300	7,300	
		6	Sum of Capacity Constraint Coefficients		1.00	0.85	0.60	Primary constraints are status as "Horizon 2" Urban Village, lack of planning to date, and value of existing uses.
			<i>Planning and Entitlement Criteria</i>		0.05	0.05	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.90	0.75	0.60	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.00	
		7	EPS estimate of housing production given constraints		0	1,095	2,920	
		8	Percentage of PDA 2040 housing allocation accommodated		0.0%	15.0%	40.0%	
		Summary		San Jose's Urban Village program places areas into "Horizons" in which housing development can occur. This PDA is in "Horizon 2", meaning development cannot commence here until progress is made in other parts of the City, including places with their own constraints. Because of this, it is uncertain when any residential development will occur in this or any other Horizon 2 or 3 Urban Village. In addition, planning efforts also will be delayed until development horizon is nearer, and this area's growth assumes redevelopment of primarily existing commercial uses, some of which are quite new and performing well and of value to the City. Finally, infrastructure needs are thought to be reasonable, but have not really been explored yet. This PDA is among the least predictable of those reviewed in this study, and thus has among the deepest discounts for baseline "readiness".				

**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.05	0.00	No. This PDA/Urban Village is in the City's "Horizon 2" category, and detailed planning likely will not occur in this area for several years.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None expected at this time.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City has advanced Urban Village planning in other areas and supported much multifamily development through policies and project approvals.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not yet determined, but early indications from other proximate areas such as Blossom Hill indicate community interest in higher density development than has occurred on some projects such as the Hitachi site.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.70	0.65	0.50	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, however, only 25 units are reported to have been built since 2000, as the area has been developed as commercial and retail uses instead. Completion of plans/EIRs for these areas should accelerate pace of absorption vs. recent trendline.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	City reports no units currently in the development pipeline for this PDA, consistent with its status as a "Horizon 2" Urban Village where new housing cannot commence until significant progress is made in other Urban Villages.
		3	General Market Conditions		0.00	0.00	0.00	Strong housing values overall in San Jose, but this area has somewhat more modest values than Downtown or closer to major job centers.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Most sites require redevelopment of existing uses, including retail centers performing reasonably well and even expanding recently.

**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	0.00	Parcel sizes assumed for new development are generally large and regular.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.00	0.00	To be explored through future planning efforts, though it is not expected that major or atypical improvements will be required.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.05	0.00	City has some Citywide fees, but would need to create an area-specific fee or financing program for this area.	
		3	PDA financing capacity	0.00	0.00	0.00	To be explored through future planning efforts, though it is not expected that major or atypical improvements will be required.	

**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	7,300				City of San Jose Urban Village Plans assume 7,300 housing units in this area, though advanced planning has not yet occurred to verify this figure.
		2	<i>Plan Bay Area</i> new housing allocation				7,300	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		7,300	7,300	7,300	
		6	Sum of Capacity Constraint Coefficients		1.00	0.75	0.50	Primary constraints are status as "Horizon 2" Urban Village, lack of planning to date, and value of existing uses.
			<i>Planning and Entitlement Criteria</i>		0.05	0.05	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.90	0.65	0.50	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.05	0.00	
		7	EPS estimate of housing production given constraints		0	1,825	3,650	
		8	Percentage of PDA 2040 housing allocation accommodated		0.0%	25.0%	50.0%	
			Summary	<p>San Jose's Urban Village program places areas into "Horizons" in which housing development can occur. This PDA is in "Horizon 2", meaning development cannot commence here until progress is made in other parts of the City, including places with their own constraints. Because of this, it is uncertain when any residential development will occur in this or any other Horizon 2 or 3 Urban Village. In addition, planning efforts also will be delayed until development horizon is nearer, and this area's growth assumes redevelopment of primarily existing commercial uses, some of which are quite new and performing well and of value to the City. Finally, infrastructure needs are thought to be reasonable, but have not really been explored yet. This PDA is among the least predictable of those reviewed in this study, and thus has among the deepest discounts for baseline "readiness."</p> <p>Amended scenario assumes City's restriction on "Horizon 2" Urban Village planning and development is lifted and development can proceed sooner than under baseline scenario.</p>				

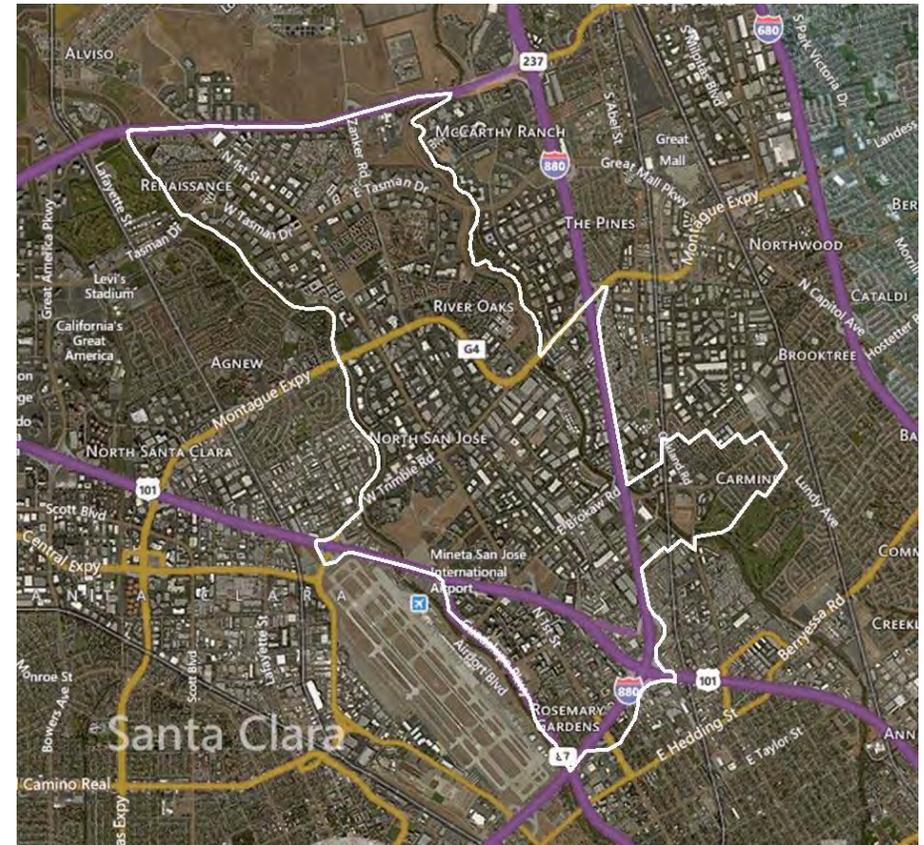
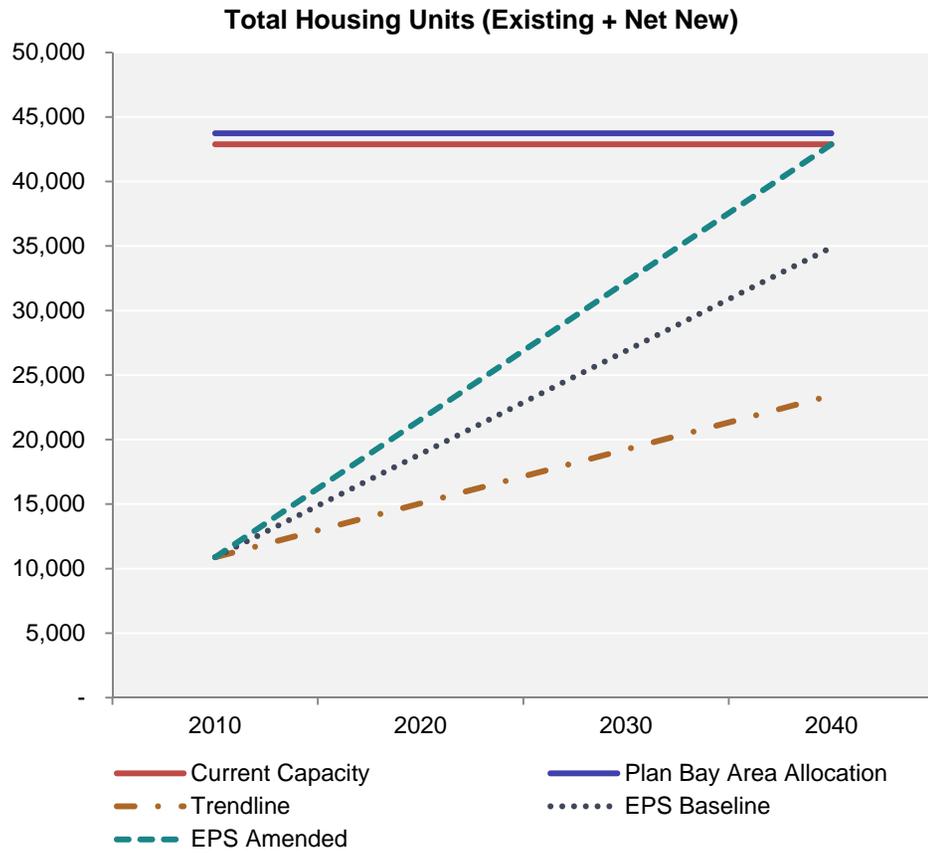
**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.05	0.00	No. This PDA/Urban Village is in the City's "Horizon 2" category, and detailed planning likely will not occur in this area for several years.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None expected at this time.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	City has advanced Urban Village planning in other areas and supported much multifamily development through policies and project approvals.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not yet determined, but early indications from other proximate areas such as Blossom Hill indicate community interest in higher density development than has occurred on some projects such as the Hitachi site.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.70	0.55	0.40	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, however, only 25 units are reported to have been built since 2000, as the area has been developed as commercial and retail uses instead. Completion of plans/EIRs for these areas should accelerate pace of absorption vs. recent trendline.  <i>Amended scenario assumes City's restriction on "Horizon 2" Urban Village planning and development is lifted and development can proceed sooner than under baseline scenario.</i>
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	City reports no units currently in the development pipeline for this PDA, consistent with its status as a "Horizon 2" Urban Village where new housing cannot commence until significant progress is made in other Urban Villages.
		3	General Market Conditions		0.00	0.00	0.00	Strong housing values overall in San Jose, but this area has somewhat more modest values than Downtown or closer to major job centers.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Most sites require redevelopment of existing uses, including retail centers performing reasonably well and even expanding recently.

**Table A-47. San Jose: Oakridge/Almaden Plaza Urban Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration		0.00	0.00	0.00	Parcel sizes assumed for new development are generally large and regular.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.00	0.00	0.00	To be explored through future planning efforts, though it is not expected that major or atypical improvements will be required.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.00	City has some Citywide fees, but would need to create an area-specific fee or financing program for this area.
		3	PDA financing capacity		0.00	0.00	0.00	To be explored through future planning efforts, though it is not expected that major or atypical improvements will be required.

# San Jose: North San Jose



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
32,850	32,000	24,000	73%	Policy constraint tying housing to employment growth	32,000	97%	Removal of housing phasing constraint

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	32,000				North San Jose Area Development Policy (2010) "provides for development of up to 32,000 new residential units, including at least 18,650 developed through the conversion of 285 acres of existing industrial lands . . . New residential units would also be allowed through mixed-use development within the Core Area and on land with residential designations at the time this policy was adopted."
		2	<i>Plan Bay Area</i> new housing allocation				32,850	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(850)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Plan is already pushing densities well beyond current development standards, and has aggressive minimum density requirements.
		5	Estimated gross housing capacity at each period		32,000	32,000	32,000	
		6	Sum of Capacity Constraint Coefficients		0.75	0.50	0.25	Only constraint identified is the policy requiring jobs/housing balance by limiting housing growth to four 8,000 unit phases that can't be surpassed until
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.75	0.50	0.25	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		8,000	16,000	24,000	
		8	Percentage of PDA 2040 housing allocation accommodated		24.4%	48.7%	73.1%	
			Summary	Physical capacity, market interest, financial feasibility, and infrastructure conditions are all strong in this PDA. However, City's policy linking housing permits to non-residential development represents a major constraint on housing growth, which would almost certainly continue at a faster pace if not thus constrained.				

**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	North San Jose Plan and EIR adopted in 2005. City may do additional smaller area plans to improve subarea planning and use mix. City also exploring revisions to EIR to reduce standards for transportation improvements.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Does not require removal of SFR neighborhoods, but does assume significant redevelopment of industrial lands. Residential conversion is restricted if it would occur on an existing important 'driving' industrial use or is adjacent to an industrial use that would be adversely affected.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	North San Jose plan adopted in 2005, amended several times up to 2012. BMR requirement was added, but no big opposition at all. Significant housing density has already been approved and built, and Mayor has publicly stated openness to accelerating housing development to support infrastructure investment.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Not a significant issue in this PDA.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.75</b>	<b>0.50</b>	<b>0.25</b>	Nearly 8,000 housing units have been built in this PDA since 2010, indicating very strong demand and investor interest. <b>MAJOR CONSTRAINT:</b> Policy restricts Phase 1 growth to 8K DU's until 7M SF of industrial is developed, then same for Phases 2-4. City shows all Phase 1 housing units have been allocated already, but only a fraction of the industrial development, and City doesn't anticipate opening "phase 2" housing for another 5 to 10 years.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Pipeline is currently limited only due to phasing constraints in the Plan.	
		3	General Market Conditions	0.00	0.00	0.00	Strong residential market as evident in development activity. Accessible area in major employment center, with many good-paying jobs locally and in greater area.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Market activity indicates that housing is feasible on numerous sites that are underutilized.	

**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Generally large and well-configured for efficient development, but Rincon South area has some smaller parcels for smaller projects.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Policy calls for new schools, fire station, police station, parks, plus traffic improvements. City may be revisiting infrastructure program to reduce burden associated with transportation.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has adopted a North San Jose impact fee, but has reduced fees from original levels to incent development, especially commercial. City may be revisiting infrastructure program to reduce burden associated with transportation.
		3	PDA financing capacity		0.00	0.00	0.00	Current impact fee burdens have not been a hurdle, as evinced by development activity.

**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	32,000				North San Jose Area Development Policy (2010) "provides for development of up to 32,000 new residential units, including at least 18,650 developed through the conversion of 285 acres of existing industrial lands . . . New residential units would also be allowed through mixed-use development within the Core Area and on land with residential designations at the time this policy was adopted."	
		2	<i>Plan Bay Area</i> new housing allocation				32,850	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(850)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Plan is already pushing densities well beyond current development standards, and has aggressive minimum density requirements.	
		5	Estimated gross housing capacity at each period		32,000	32,000	32,000		
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.00	Only constraint identified is the policy requiring jobs/housing balance by limiting housing growth to four 8,000 unit phases that can't be surpassed until 7 million SF of new "industrial" space is developed in each phase.	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.75	0.40	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00		
		7	EPS estimate of housing production given constraints		8,000	19,200	32,000	Physical capacity, market interest, and infrastructure conditions are all strong, but policy linking housing growth to non-residential development is likely to constrain the pace of development.	
		8	Percentage of PDA 2040 housing allocation accommodated		24.4%	58.4%	97.4%		
			Summary	Physical capacity, market interest, financial feasibility, and infrastructure conditions are all strong in this PDA. However, City's policy linking housing permits to non-residential development represents a major constraint on housing growth, which would almost certainly continue at a faster pace if not thus constrained.					
				Amended scenario assumes City lifts that phasing constraint and allows housing development to proceed according to housing demand rather than being tied to commercial development permits.					

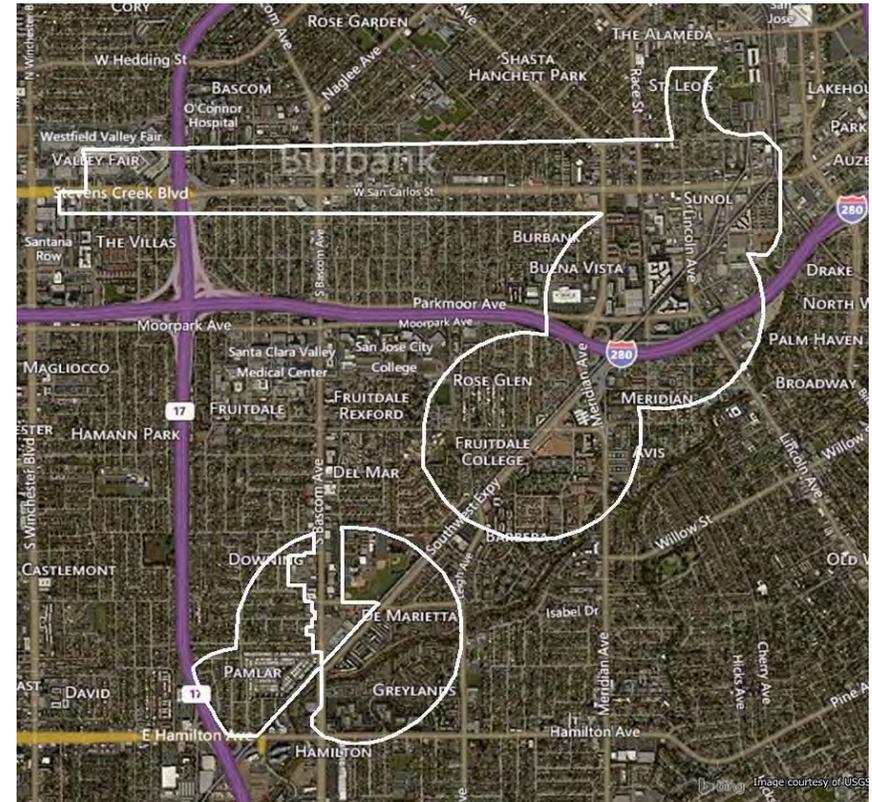
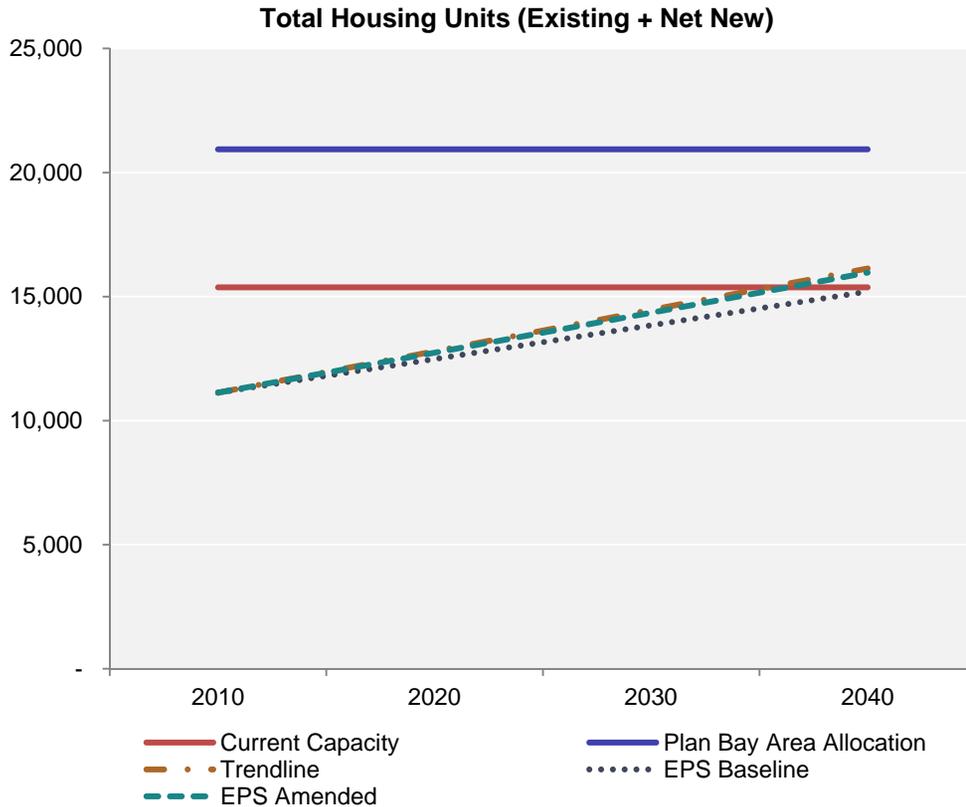
**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	North San Jose Plan and EIR adopted in 2005. City may do additional smaller area plans to improve subarea planning and use mix. City also exploring revisions to EIR to reduce standards for transportation improvements.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Does not require removal of SFR neighborhoods, but does assume significant redevelopment of industrial lands. Residential conversion is restricted if it would occur on an existing important 'driving' industrial use or is adjacent to an industrial use that would be adversely affected.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	North San Jose plan adopted in 2005, amended several times up to 2012. BMR requirement was added, but no big opposition at all. Significant housing density has already been approved and built, and Mayor has publicly stated openness to accelerating housing development to support infrastructure investment.
		2	History of neighborhood opposition		0.00	0.00	0.00	Not a significant issue in this PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.75</b>	<b>0.40</b>	0.00	Nearly 8,000 housing units have been built in this PDA since 2010, indicating very strong demand and investor interest. <b>MAJOR CONSTRAINT:</b> Policy restricts Phase 1 growth to 8K DU's until 7M SF of industrial is developed, then same for Phases 2-4. City shows all Phase 1 housing units have been allocated already, but only a fraction of the industrial development, and City doesn't anticipate opening "phase 2" housing for another 5 to 10 years.  Amended scenario assumes City eliminates this phasing requirement and allows housing to proceed according to market demand for housing, not employment development.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Pipeline is currently limited only due to phasing constraints in the Plan.
		3	General Market Conditions		0.00	0.00	0.00	Strong residential market as evident in development activity. Accessible area in major employment center, with many good-paying jobs locally and in greater area.

**Table A-48. San Jose: North San Jose**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> (continued)	4	Financial Feasibility Constraint		0.00	0.00	0.00	Market activity indicates that housing is feasible on numerous sites that are underutilized.
		5	Parcel size and configuration		0.00	0.00	0.00	Generally large and well-configured for efficient development, but Rincon South area has some smaller parcels for smaller projects.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Policy calls for new schools, fire station, police station, parks, plus traffic improvements. City may be revisiting infrastructure program to reduce burden associated with transportation.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has adopted a North San Jose impact fee, but has reduced fees from original levels to incent development, especially commercial. City may be revisiting infrastructure program to reduce burden associated with transportation.
		3	PDA financing capacity		0.00	0.00	0.00	Current impact fee burdens have not been a hurdle, as evinced by development activity.

# San Jose: West San Carlos and Southwest Expressway Corridors



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
9,810	4,245	4,075	42%	Site availability and policies on phasing	4,839	49%	Parcel assembly tools and adjustments to "jobs" requirements

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,245				City staff indicates plans for 1,245 units in West San Carlos and 3,000 units in the Southwest Expressway Corridor.
		2	<i>Plan Bay Area</i> new housing allocation				9,810	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(5,565)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	20%	20%	City has indicated that housing density in Southwest Expressway may increase if adjustments are made to that area's "jobs" goals.
		5	Estimated gross housing capacity at each period		4,245	5,094	5,094	
		6	Sum of Capacity Constraint Coefficients		0.70	0.40	0.20	Primary constraint is achievable pace of housing development given expectations that it will be matched with "jobs" development.
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.40	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		1,274	3,056	4,075	
		8	Percentage of PDA 2040 housing allocation accommodated		13.0%	31.2%	41.5%	
		Summary		Available sites and expected zoning allowances do not appear to support the level of housing allocated to this PDA. Beyond that, policies supporting infill are in place, market dynamics are generally strong and infrastructure requirements are reasonable. However, a key constraint is the requirement that housing development include or be concurrent with jobs development, which has proven challenging for San Jose in more industrial areas and may be more so in these areas not regarded as traditional employment centers.				

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Urban Village Plan/EIR for West San Carlos (WSC) expected to be complete by EOY 2015, but no plan yet for Southwest Expressway (SWE) which is in "Horizon 2" of City's Urban Village plans.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Some redevelopment of older apartments in SWE may occur, but not required to reach planned capacity.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has been supporting Urban Village planning with increased residential densities, and has approved numerous multifamily projects throughout City in recent years.
		2	History of neighborhood opposition		0.00	0.00	0.00	None noted at this time.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.50	0.25	0.00	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, roughly 2,900 units have been built since 2000, including 577 since 2010. Overall average in PDA since 2000 has been roughly 200 units/year, just over half of absorption pace required to achieve allocated growth through 2040. However, completion of plans/EIRs for these areas should accelerate pace of absorption vs. recent trendline.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	City reports 640 units in the pipeline as of 2015, a small proportion of the overall growth required to reach housing allocation.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents.
		4	Financial Feasibility Constraint		0.10	0.10	0.10	Current expectations include jobs component that can diminish project feasibility if included within mixed-use projects, or delay housing development if jobs are required to occur concurrently. City may be revisiting these jobs requirements in 2016, but some similar restrictions are assumed to remain in place, though perhaps at a lower level.
		5	Parcel size and configuration		0.00	0.05	0.10	Sites range in size and configuration within these already urbanized areas, and the most developable sites are assumed to be used first, leaving more problematic sites for future development.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted at this time.

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Basic infrastructure is believed to be adequate or improvable with existing fee structure. City has explored opportunities and programs for enhanced community benefits but these are not required to make development viable.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has existing impact fee programs that are believed to be adequate for capacity improvements to infrastructure.
		3	PDA financing capacity		0.00	0.00	0.00	Strong unit values appear to support required level of infrastructure investment and fee burdens for basic infrastructure.

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,245				City staff indicates plans for 1,245 units in West San Carlos and 3,000 units in the Southwest Expressway Corridor.	
		2	<i>Plan Bay Area</i> new housing allocation				9,810	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(5,565)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	20%	20%	City has indicated that housing density in Southwest Expressway may increase if adjustments are made to that area's "jobs" goals.	
		5	Estimated gross housing capacity at each period		4,245	5,094	5,094		
		6	Sum of Capacity Constraint Coefficients		0.70	0.35	0.05	Primary constraint is achievable pace of housing development given expectations that it will be matched with "jobs" development.	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.70	0.35	0.05		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00		
		7	EPS estimate of housing production given constraints		1,274	3,311	4,839		
		8	Percentage of PDA 2040 housing allocation accommodated		13.0%	33.8%	49.3%		
			Summary	Available sites and expected zoning allowances do not appear to support the level of housing allocated to this PDA. Beyond that, policies supporting infill are in place, market dynamics are generally strong and infrastructure requirements are reasonable. However, a key constraint is the requirement that housing development include or be concurrent with jobs development, which has proven challenging for San Jose in more industrial areas and may be more so in these areas not regarded as traditional employment centers.					
				Amended scenario assumes adjustments to City's jobs requirements and restoration of parcel assembly tools will enhance housing feasibility and yield.					

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

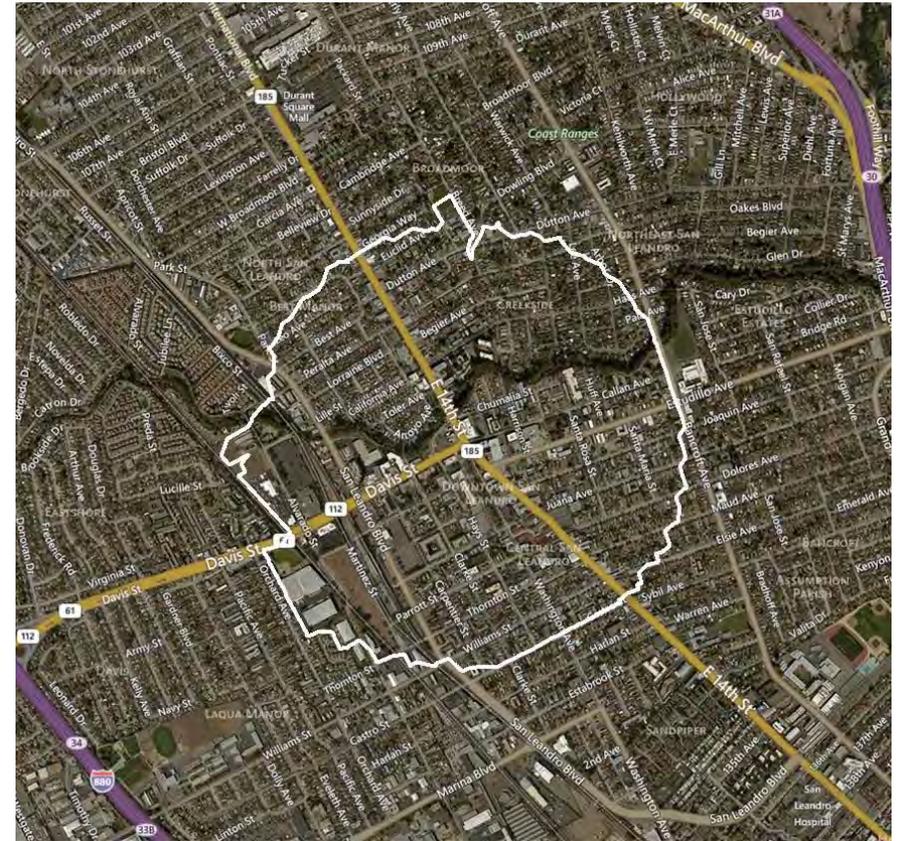
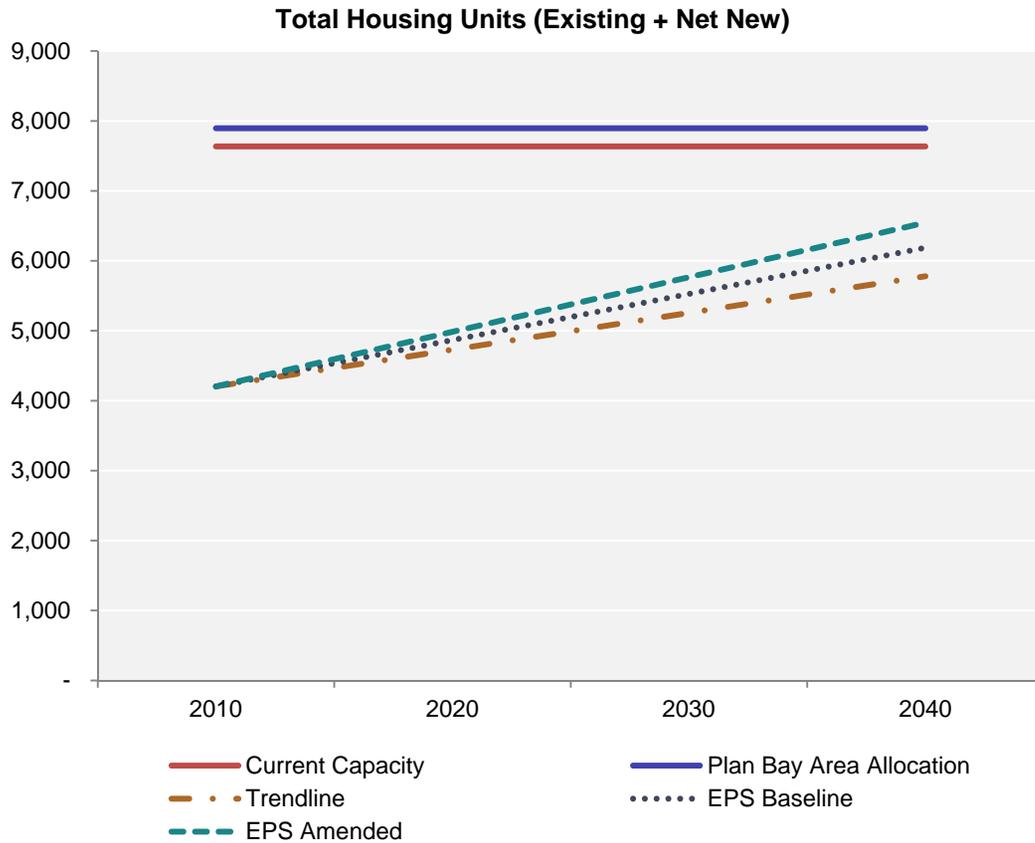
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Urban Village Plan/EIR for West San Carlos (WSC) expected to be complete by EOY 2015, but no plan yet for Southwest Expressway (SWE) which is in "Horizon 2" of City's Urban Village plans.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Some redevelopment of older apartments in SWE may occur, but not required to reach planned capacity.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has been supporting Urban Village planning with increased residential densities, and has approved numerous multifamily projects throughout City in recent years.
		2	History of neighborhood opposition		0.00	0.00	0.00	None noted at this time.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.50	0.25	0.00	City overall has permitted nearly 3,000 units/year (avg.) between 2000-2013, mostly multifamily. Within this PDA, roughly 2,900 units have been built since 2000, including 577 since 2010. Overall average in PDA since 2000 has been roughly 200 units/year, just over half of absorption pace required to achieve allocated growth through 2040. However, completion of plans/EIRs for these areas should accelerate pace of absorption vs. recent trendline.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	City reports 640 units in the pipeline as of 2015, a small proportion of the overall growth required to reach housing allocation.
		3	General Market Conditions		0.00	0.00	0.00	Strong achievable housing prices as the area serves many Silicon Valley tech workers as well as traditional San Jose residents.
		4	Financial Feasibility Constraint		0.10	0.05	0.05	Current expectations include jobs component that can diminish project feasibility if included within mixed-use projects, or delay housing development if jobs are required to occur concurrently. City may be revisiting these jobs requirements in 2016, but some similar restrictions are assumed to remain in place, though perhaps at a lower level.

Amended scenario assumes adjustments are made to enhance feasibility of new projects.

**Table A-49. San Jose: West San Carlos and Southwest Expressway Corridors**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	Market and Investment Attractiveness <i>(continued)</i>	5	Parcel size and configuration		0.00	0.05	0.00	Sites range in size and configuration within these already urbanized areas, and the most developable sites are assumed to be used first, leaving more problematic sites for future development.  <i>Amended scenario assumes restored parcel assembly tools can assist with this constraint.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted at this time.
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.00	0.00	0.00	Basic infrastructure is believed to be adequate or improvable with existing fee structure. City has explored opportunities and programs for enhanced community benefits but these are not required to make development viable.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	City has existing impact fee programs that are believed to be adequate for capacity improvements to infrastructure.
		3	PDA financing capacity		0.00	0.00	0.00	Strong unit values appear to support required level of infrastructure investment and fee burdens for basic infrastructure.

# San Leandro: Downtown Transit Oriented Development



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,690	3,430	1,981	54%	Limited site availability and infill parcelization	2,341	63%	Parcel assembly tools available

**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,430				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Unit-estimate reflects the number targeted in the adopted Downtown TOD Development Strategy.
		2	<i>Plan Bay Area</i> new housing allocation				3,690	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(260)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	5%	San Leandro adopted a Downtown Plan in 2007, including a certified EIR for development of about 3,430 units. This Plan's horizon is through 2030. At that time, the City may reassess and develop a new plan with additional density in the near future. To model this potential future planning effort subsequent to 2030, a small increase in density is assumed between 2030 and 2040.
		5	Estimated gross housing capacity at each period		3,430	3,430	3,602	
		6	Sum of Capacity Constraint Coefficients		0.75	0.50	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.50	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.00	0.00	
		7	EPS estimate of housing production given constraints		858	1,715	1,981	
		8	Percentage of PDA 2040 housing allocation accommodated		23.2%	46.5%	53.7%	
			Summary	San Leandro's downtown PDA has the necessary regulatory framework in place to accommodate multifamily and mixed-use development nearly equal to the Plan Bay Area allocation. The PDA is constrained by limited land supply, small and irregular-shaped parcels, competition for land from non-residential uses, existing uses on underutilized land, and a need for midrise projects and structured parking to meet the PDA allocation.				

**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the City has an adopted Downtown Transit-Oriented Development Strategy and program-level EIR.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None of the existing residential units in Downtown San Leandro are presumed to be redeveloped nor need to be redeveloped to achieve allocation.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of San Leandro has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	During the planning process for the Downtown TOD Strategy, some organized opposition to higher density development was evident. However, since the adoption of the Plan, two recent Downtown projects have been approved without major opposition. There has not been significant and organized neighborhood opposition to pending development proposals or the <i>Plan Bay Area</i> allocations	
	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	<p>Investment in new housing in Alameda County is still in recovery, post-Recession. The total number of units permitted in the County in 2014 was about 50% of the peak-level reached during the housing boom in the early 2000s. This compares with the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 125 units permitted per year between 1980 and 2013. The PDA would need to average 150 units per year between 2015 and 2040 to achieve its unit-allocation.</p> <p>Multifamily housing starts in San Leandro have comprised 44% of total housing starts since 1980 which is similar to the proportion for Alameda County of 45% over the period.</p> <p>Overall, investment in the City's real estate has lagged trends in the County but the pipeline indicators are positive. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1980 and 2013 to reach the allocation by about 15%.</p>	
		2	Recent Local Development Activity (pipeline)	0.15	0.00	0.00	The City's 2015 RHNA notes that 79 units were build in 2010, 2011, 2012, and 2013. None of these units were located in the PDA. Projects in the pipeline or under construction in the PDA include: a 200 unit affordable project is now under construction (two phases) with an estimated completion of 2016 for the initial 115 units and 2018 for the remaining 85 units; Phase 1 of a 340,000 to 500,000 square foot office complex; and also, a mixed-use project with office and 68 residential units. Including projects City staff are aware of but do not yet have applications for (about 160 units), the residential pipeline represents approximately 8 percent of the <i>Plan Bay Area</i> allocation. Pending applications indicate interest in commercial development in the PDA. As development continues, residential uses will need to compete with commercial development for scarce land.	

**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.10	0.10	0.10	Educational attainment and household income of existing PDA residents indicate weak market conditions. The proportion of PDA residents with 4-year college degree or higher was 33% in 2012 compared with 43% Bay Area-wide. Household income in the PDA was \$49,000 in the same year compared with \$80,300 Bay Area-wide. However, population growth exceeded growth Bay Area-wide.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.00 per sq.ft. per month for apartments and \$340 per square foot for condos. While average rents for apartments are not sufficient to justify multifamily development, some complexes are achieving rents as high as \$2.60, which is nearer to feasibility for a new apartment building. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.	
		5	Parcel size and configuration	0.00	0.05	0.10	Parcels size in the PDA is significant barrier to infill development. With only about 20-acres available for redevelopment in the PDA and a major tech campus slated one of the larger parcels (a 7.5-acre site), much of the remaining space is on small or narrow parcels.	
		6	Existence of major investment disincentives	0.10	0.10	0.10	Parcel assembly and property owners' unwillingness to sell land are some of the major disincentives for investment in the PDA.	
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.00	0.00	Existing utilities are generally sized to accommodate growth. The Downtown is in need of additional streetlighting, particularly pedestrian-level lighting to increase evening-time safety.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has several types of development impact fees in place. Though the Downtown Strategy does not include a specific improvement list, the City's list of completed capital improvements in the Downtown includes pedestrian improvements and improvements to the City's Downtown parking garage.	
		3	PDA financing capacity	0.00	0.00	0.00	Growth in the PDA along with other funding sources is expected to be sufficient to cover needed infrastructure improvements Downtown.	

**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,430				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Unit-estimate reflects the number targeted in the adopted Downtown TOD Development Strategy.	
		2	<i>Plan Bay Area</i> new housing allocation				3,690	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(260)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	5%	San Leandro adopted a Downtown Plan in 2007, including a certified EIR for development of about 3,430 units. This Plan's horizon is through 2030. At that time, the City may reassess and develop a new plan with additional density in the near future. To model this potential future planning effort subsequent to 2030, a small increase in density is assumed between 2030 and 2040.	
		5	Estimated gross housing capacity at each period		3,430	3,430	3,602		
		6	Sum of Capacity Constraint Coefficients		0.75	0.45	0.35		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.70	0.45	0.35		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.05	0.00	0.00		
		7	EPS estimate of housing production given constraints		858	1,887	2,341		
		8	Percentage of PDA 2040 housing allocation accommodated		23.2%	51.1%	63.4%		
			Summary	<p>San Leandro's downtown PDA has the necessary regulatory framework in place to accommodate multifamily and mixed-use development nearly equal to the Plan Bay Area allocation. The PDA is constrained by limited land supply, small and irregular-shaped parcels, competition for land from non-residential uses, existing uses on underutilized land, and a need for midrise projects and structured parking to meet the PDA allocation.</p> <p><b>In the amended scenario, the City or another entity is presumed to have parcel-assembly tools which it could use to assemble underutilized properties into a project site.</b></p>					

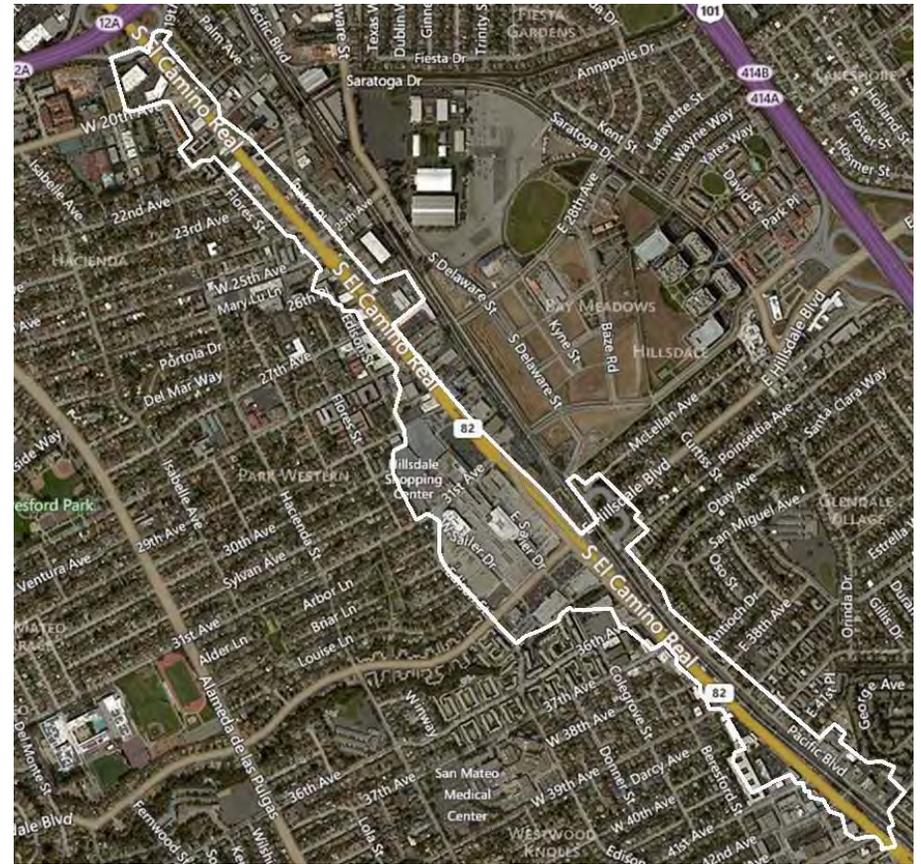
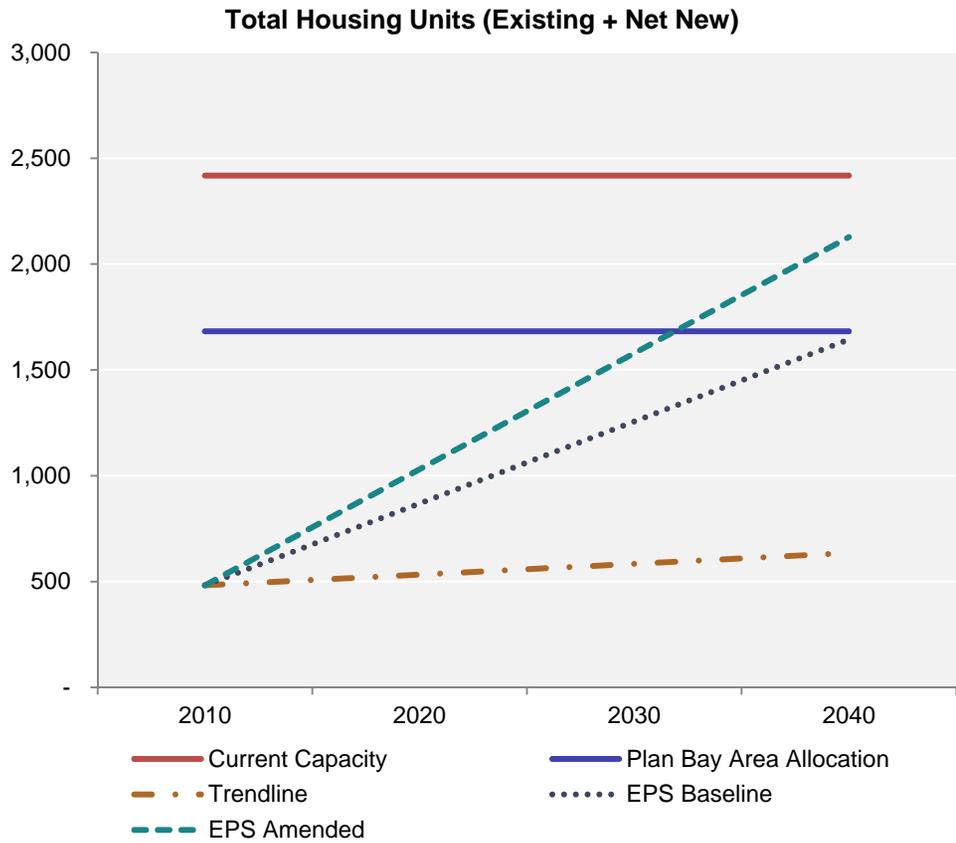
**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Yes, the City has an adopted Downtown Transit-Oriented Development Strategy and program-level EIR.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None of the existing residential units in Downtown San Leandro are presumed to be redeveloped nor need to be redeveloped to achieve allocation.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	The City of San Leandro has been supportive of the <i>Plan Bay Area</i> process related to the allocations of housing units.	
		2	History of neighborhood opposition	0.00	0.00	0.00	During the planning process for the Downtown TOD Strategy, some organized opposition to higher density development was evident. However, since the adoption of the Plan, two recent Downtown projects have been approved without major opposition. There has not been significant and organized neighborhood opposition to pending development proposals or the <i>Plan Bay Area</i> allocations	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.10	<p>Investment in new housing in Alameda County is still in recovery, post-Recession. The total number of units permitted in the County in 2014 was about 50% of the peak-level reached during the housing boom in the early 2000s. This compares with the number of housing permits Bay Area-wide, which reached about 73% of the 2003-peak, in 2013.</p> <p>The City as a whole averaged about 125 units permitted per year between 1980 and 2013. The PDA would need to average 150 units per year between 2015 and 2040 to achieve its unit-allocation.</p> <p>Multifamily housing starts in San Leandro have comprised 44% of total housing starts since 1980 which is similar to the proportion for Alameda County of 45% over the period.</p> <p>Overall, investment in the City's real estate has lagged trends in the County but the pipeline indicators are positive. Annual units constructed in the PDA would need to surpass the average-units constructed Citywide between 1980 and 2013 to reach the allocation by about 15%.</p>	
		2	Recent Local Development Activity (pipeline)	0.15	0.00	0.00	The City's 2015 RHNA notes that 79 units were build in 2010, 2011, 2012, and 2013. None of these units were located in the PDA. Projects in the pipeline or under construction in the PDA include: a 200 unit affordable project is now under construction (two phases) with an estimated completion of 2016 for the initial 115 units and 2018 for the remaining 85 units; Phase 1 of a 340,000 to 500,000 square foot office complex; and also, a mixed-use project with office and 68 residential units. Including projects City staff are aware of but do not yet have applications for (about 160 units), the residential pipeline represents approximately 8 percent of the <i>Plan Bay Area</i> allocation. Pending applications indicate interest in commercial development in the PDA. As development continues, residential uses will need to compete with commercial development for scarce land.	

**Table A-50. San Leandro: Downtown Transit Oriented Development**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	3	General Market Conditions	0.10	0.10	0.10	Educational attainment and household income of existing PDA residents indicate weak market conditions. The proportion of PDA residents with 4-year college degree or higher was 33% in 2012 compared with 43% Bay Area-wide. Household income in the PDA was \$49,000 in the same year compared with \$80,300 Bay Area-wide. However, population growth exceeded growth Bay Area-wide.	
		4	Financial Feasibility Constraint	0.15	0.10	0.05	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.00 per sq.ft. per month for apartments and \$340 per square foot for condos. While average rents for apartments are not sufficient to justify multifamily development, some complexes are achieving rents as high as \$2.60, which is nearer to feasibility for a new apartment building. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades.	
		5	Parcel size and configuration	0.00	0.00	0.05	Parcels size in the PDA is significant barrier to infill development. With only about 20-acres available for redevelopment in the PDA and a major tech campus slated one of the larger parcels (a 7.5-acre site), much of the remaining space is on small or narrow parcels.  <i>Amended scenario assumes tools available to the City or other entity for assembly of underutilized parcels.</i>	
		6	Existence of major investment disincentives	0.10	0.10	0.05	Parcel assembly and property owners' unwillingness to sell land are some of the major disincentives for investment in the PDA.  <i>Amended scenario assumes tools available to the City or other entity to work with property owners to assemble parcels.</i>	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.00	0.00	Existing utilities are generally sized to accommodate growth. The Downtown is in need of additional streetlighting, particularly pedestrian-level lighting to increase evening-time safety.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	The City has several types of development impact fees in place. Though the Downtown Strategy does not include a specific improvement list, the City's list of completed capital improvements in the Downtown includes pedestrian improvements and improvements to the City's Downtown parking garage.	
		3	PDA financing capacity	0.00	0.00	0.00	Growth in the PDA along with other funding sources is expected to be sufficient to cover needed infrastructure improvements Downtown.	

# San Mateo: El Camino Real



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,200	1,936	1,162	97%	Infill parcelization and grade separation	1,646	137%	Parcel assembly tools and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,936				CD+A identified 39 acres of developable land, which would need to average 50 du/acre for this capacity figure.
		2	<i>Plan Bay Area</i> new housing allocation				1,200	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	736				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,936	1,936	1,936	
		6	Sum of Capacity Constraint Coefficients		0.85	0.60	0.40	Primary constraint is site configuration and assembly requirements, as market is strong and infrastructure needs are reasonable.
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.05	0.05	
			<i>Market and Investment Attractiveness</i>		0.55	0.30	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.25	0.15	
		7	EPS estimate of housing production given constraints		290	774	1,162	
		8	Percentage of PDA 2040 housing allocation accommodated		24.2%	64.5%	96.8%	
		<b>Summary</b>		The El Camino Real Corridor has undergone extensive planning and environmental clearance, and has policies that support significant infill housing development. The housing market is strong, and infrastructure needs are generally reasonable, though desires for Caltrain grade separations may slow long-term growth. The primary constraint is that many parcels in the corridor are very shallow and awkwardly configured for new development, plus have existing uses that make land value requirements relatively high.				

**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.05	0.00	0.00	Entitlements are in place through the El Camino Real Master Plan (2001) and the Hillsdale Station Area Plan (2011), adopted programmatic EIR and neg dec, and Zoning/General Plan amendments. City has suggested some additional project-level analysis of traffic and other issues may be required, particularly given the age of the ECR Master Plan.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required, as this PDA is along the commercial corridor.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has approved higher density housing development projects on sites throughout the City, though not many yet proposed in this PDA.	
		2	History of neighborhood opposition	0.00	0.05	0.05	City reports strong support from housing advocates, and no significant opposition from neighborhoods in general. However, City does think some opposition may occur as more projects are actually proposed, particularly in light of expected traffic concerns.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.30	0.15	0.00	Numerous residential projects have been completed in the City and/or are underway, reflecting market interest in housing in the City and high achievable unit values. However, most of these are on sites outside this PDA (including in the Rail Corridor PDA) because the sites on El Camino Real are somewhat more challenging to develop due to physical and ownership issues.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	Former diner site proposed for development with density bonus	
		3	General Market Conditions	0.00	0.00	0.00	San Mateo is an attractive and relatively high-value community with above-average incomes and education levels, a strong local employment base and access to regional job centers.	

**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		4	Financial Feasibility Constraint	0.05	0.05	0.05	Though San Mateo home values are high and multifamily housing is in demand, virtually all new development on this corridor must occur on sites with existing uses and ongoing cash flow. Physical constraints for these sites, including typically shallow lots, make efficient development challenging. However, City reports that some long-time property owners (typically family trusts) have shown willingness to redevelop for higher value uses as existing buildings near the end of their useful lives.	
		5	Parcel size and configuration	0.10	0.10	0.15	City identifies land assembly/parcelization as the primary challenge to realizing planned growth in this PDA. Challenge is likely to increase over time as most developable sites are re-used earlier.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None noted, as schools are generally good, crime is not a major issue, and access to jobs and commuter transit services is a major advantage.	
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity	0.10	0.10	0.00	Infrastructure is largely in place. Most infrastructure demands are for aesthetic improvements, bike/ped facilities, etc. ECR and Hillsdale undercrossing may be an eventual constraint, which may be addressed through Caltrain electrification project.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.05	0.05	0.05	City has impact fee program for transportation, schools, parks, housing, water/wastewater, etc. No plan to finance grade separation, however.	
		3	PDA financing capacity	0.10	0.10	0.10	Most infrastructure costs are reasonable given the high achievable values for residential property. However, grade separations for Caltrain would be desirable or necessary to facilitate full buildout. This grade separation issue will affect later phases of development, not initial phases.	

**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,936				CD+A identified 39 acres of developable land, which would need to average 50 du/acre for this capacity figure.
		2	<i>Plan Bay Area</i> new housing allocation				1,200	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	736				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,936	1,936	1,936	
		6	Sum of Capacity Constraint Coefficients		0.85	0.60	0.15	Primary constraint is site configuration and assembly requirements, as market is strong and infrastructure needs are reasonable.
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.05	0.05	
			<i>Market and Investment</i>		0.55	0.30	0.10	
			<i>Attractiveness (continued)</i>					
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.25	0.00	
		7	EPS estimate of housing production given constraints		290	774	1,646	
		8	Percentage of PDA 2040 housing allocation accommodated		24.2%	64.5%	137.1%	
			Summary	The El Camino Real Corridor has undergone extensive planning and environmental clearance, and has policies that support significant infill housing development. The housing market is strong, and infrastructure needs are generally reasonable, though desires for Caltrain grade separations may slow long-term growth. The primary constraint is that many parcels in the corridor are very shallow and awkwardly configured for new development, plus have existing uses that make land value requirements relatively high. <b>Amended scenario assumes external funding received for grade separations, and restoration of tools for acquisition and assembly of property.</b>				

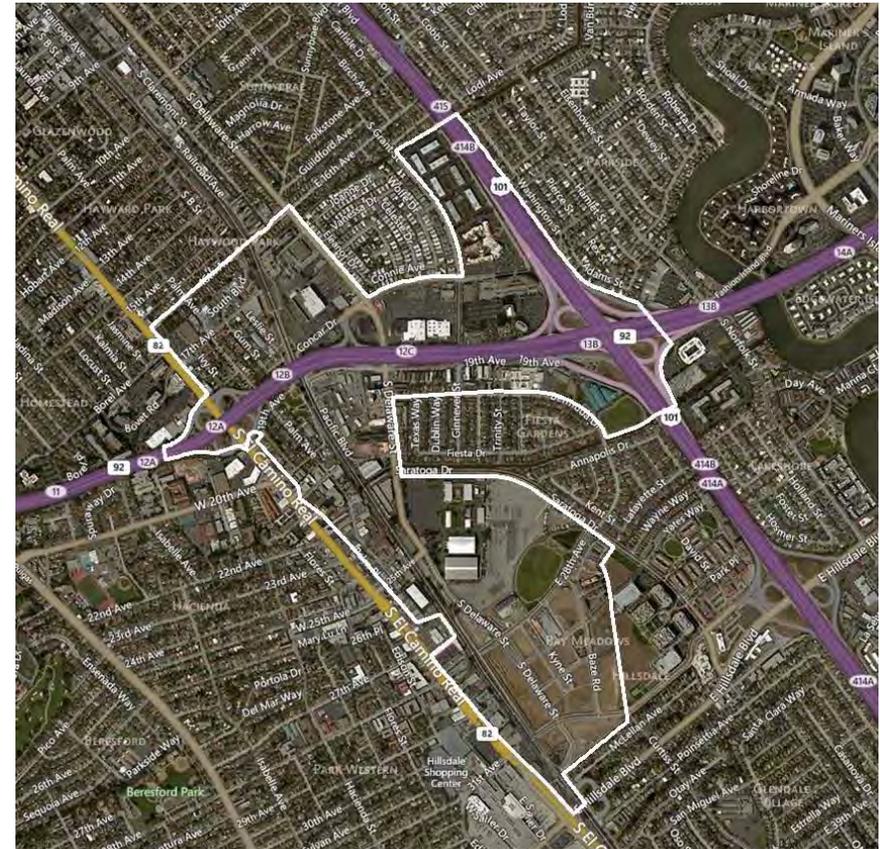
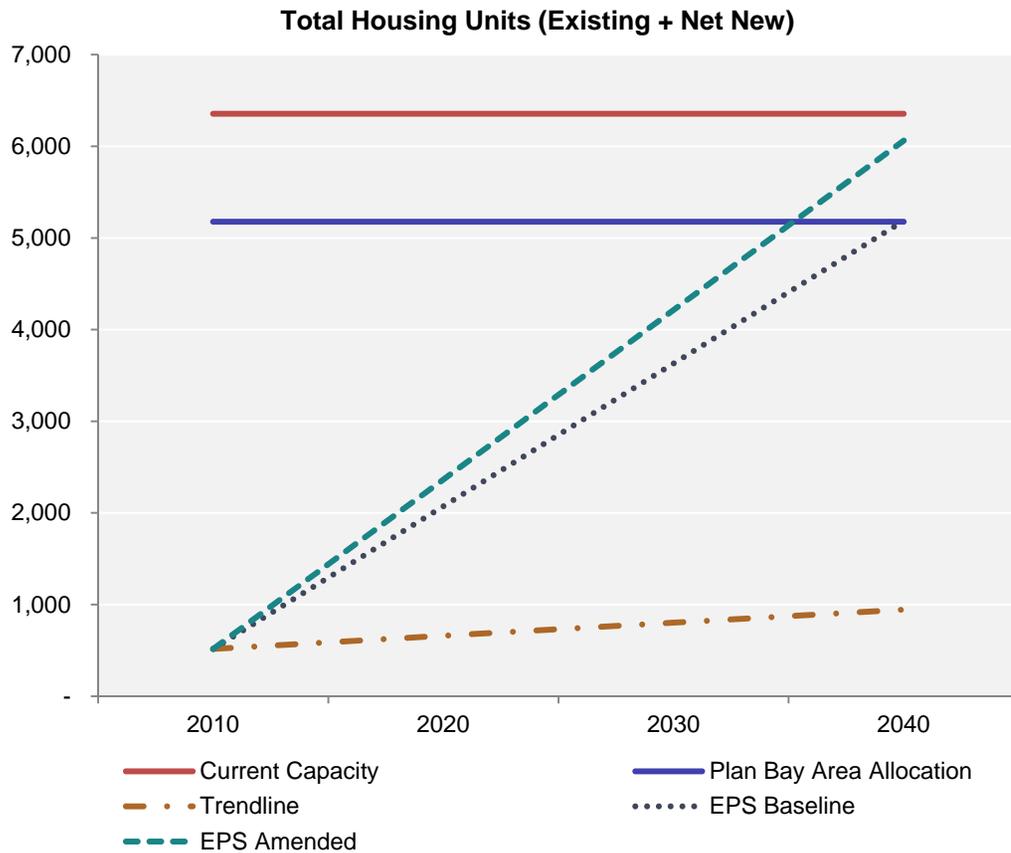
**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B. Planning and Entitlement Criteria</b>		1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	Entitlements are in place through the El Camino Real Master Plan (2001) and the Hillsdale Station Area Plan (2011), adopted programmatic EIR and neg dec, and Zoning/General Plan amendments. City has suggested some additional project-level analysis of traffic and other issues may be required, particularly given the age of the ECR Master Plan.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required, as this PDA is along the commercial corridor.
<b>C. Community Support</b>		1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has approved higher density housing development projects on sites throughout the City, though not many yet proposed in this PDA.
		2	History of neighborhood opposition		0.00	0.05	0.05	City reports strong support from housing advocates, and no significant opposition from neighborhoods in general. However, City does think some opposition may occur as more projects are actually proposed, particularly in light of expected traffic concerns.
		1	History of real estate investment in PDA and surrounding city		0.30	0.15	0.00	Numerous residential projects have been completed in the City and/or are underway, reflecting market interest in housing in the City and high achievable unit values. However, most of these are on sites outside this PDA (including in the Rail Corridor PDA) because the sites on El Camino Real are somewhat more challenging to develop due to physical and ownership issues.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	Former diner site proposed for development with density bonus
		3	General Market Conditions		0.00	0.00	0.00	San Mateo is an attractive and relatively high-value community with above-average incomes and education levels, a strong local employment base and access to regional job centers.
		4	Financial Feasibility Constraint		0.05	0.05	0.05	Though San Mateo home values are high and multifamily housing is in demand, virtually all new development on this corridor must occur on sites with existing uses and ongoing cash flow. Physical constraints for these sites, including typically shallow lots, make efficient development challenging. However, City reports that some long-time property owners (typically family trusts) have shown willingness to redevelop for higher value uses as existing buildings near the end of their useful lives.

**Table A-51. San Mateo: El Camino Real**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.10	0.10	0.05	City identifies land assembly/parcelization as the primary challenge to realizing planned growth in this PDA. Challenge is likely to increase over time as most developable sites are re-used earlier. <b>Amended assumes restoration of some site acquisition powers to facilitate parcel assembly.</b>
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted, as schools are generally good, crime is not a major issue, and access to jobs and commuter transit services is a major advantage.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.00	Infrastructure is largely in place. Most infrastructure demands are for aesthetic improvements, bike/ped facilities, etc. ECR and Hillsdale undercrossing may be an eventual constraint, which may be addressed through Caltrain electrification project.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.00	City has impact fee program for transportation, schools, parks, housing, water/wastewater, etc. No plan to finance grade separation, however. <b>Amended assumes necessary funding secured through external funding.</b>
		3	PDA financing capacity		0.10	0.10	0.00	Most infrastructure costs are reasonable given the high achievable values for residential property. However, grade separations for Caltrain would be desirable or necessary to facilitate full buildout. This grade separation issue will affect later phases of development, not initial phases. <b>Amended assumes necessary funding secured through external funding.</b>

# San Mateo: Rail Corridor



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
4,660	5,838	4,670	100%	Infrastructure needs for rail grade separation	5,546	119%	External infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,838				Rail Corridor Specific Plan/EIR maximum densities applied to developable sites. CD+A identified 178 acres of developable land, which would need to average 33 du/acre for this capacity figure.
		2	<i>Plan Bay Area</i> new housing allocation				4,660	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,178				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	EPS does not anticipate significant upzoning of this corridor, given the relatively recent planning that has occurred.
		5	Estimated gross housing capacity at each period		5,838	5,838	5,838	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.20	Mostly affected by the pace of market absorption rather than policy constraints, though long-term growth may be affected by unique infrastructure needs (Caltrain grade separation).
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.45	0.35	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.25	0.15	
		7	EPS estimate of housing production given constraints		1,168	2,335	4,670	
		8	Percentage of PDA 2040 housing allocation accommodated		25.1%	50.1%	100.2%	
			<b>Summary</b>	The Rail Corridor has undergone extensive planning and development is underway on several of its key sites. The primary constraint is simply the pace at which development can be absorbed within a constrained area, as policies and infrastructure are largely supportive of the envisioned development and sites are relatively development-ready. In the out-years, the City may slow development at Bay Meadows to achieve trip generation goals, unless a Caltrain grade separation can be funded and implemented.				

**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Rail Corridor TOD Plan and EIR adopted 2005, encouraging intensification of development and significant housing as well as commercial development on identified opportunity sites.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	None required.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has approved higher density housing development projects consistent with TOD Plan on multiple sites within the plan PDA.	
		2	History of neighborhood opposition	0.00	0.00	0.00	City established a Citizens Advisory Committee to guide and influence the TOD Plan. No major opposition to planned development at this time.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.35	0.20	0.00	Several hundred multifamily units have been constructed in multiple projects in the Rail Corridor, including the former Police Station site and the property at Delaware and Pacific. Former Kmart site now under construction for 500 units.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Bay Meadows continues to build out and Kmart site is now under construction.	
		3	General Market Conditions	0.00	0.10	0.00	San Mateo is an attractive and relatively high-value community with above-average incomes and education levels, a strong local employment base and access to regional job centers.	
		4	Financial Feasibility Constraint	0.05	0.00	0.00	Home values and achievable rents are high enough to support new construction. Most of the sites in this PDA are larger redevelopment sites, but do not have significant existing uses generating cash flow requiring extraordinary values from new development. Achieving allocated housing requires relatively modest density (<30 DU/acre average) which has proven to be feasible in San Mateo	

**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration		0.05	0.05	0.05	Development sites are typically relatively large in this PDA, though some sites have unique ownership conditions requiring complex assembly initiatives.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted, as schools are generally good, crime is not a major issue, and access to jobs and commuter transit services is a major advantage.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.20	0.10	0.00	Backbone infrastructure is generally in place, except for desired grade separations for the Caltrain line. Large Bay Meadows site requires in-tract infrastructure (new smaller streets and utilities) but these are within plans and generally understood.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.05	City has impact fee program for transportation, schools, parks, housing, water/wastewater, etc., as well as financing plans for Bay Meadows itself. No plan to finance grade separation, however.
		3	PDA financing capacity		0.10	0.10	0.10	Most infrastructure costs are reasonable given the high achievable values for residential property. Primary issue is that full buildout of Bay Meadows cannot occur until grade separations for the Caltrain line are in place, and funding for this is not yet secured. This grade separation issue will affect later phases of development, not initial phases.

**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	PDA Housing Capacity Estimate	1	Estimate of current local land use policy new housing capacity	5,838				Rail Corridor Specific Plan/EIR maximum densities applied to developable sites. CD+A identified 178 acres of developable land, which would need to average 33 du/acre for this capacity figure.
		2	<i>Plan Bay Area</i> new housing allocation			4,660		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,178				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	EPS does not anticipate significant upzoning of this corridor, given the relatively recent planning that has occurred.
		5	Estimated gross housing capacity at each period		5,838	5,838	5,838	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.05	Mostly affected by the pace of market absorption rather than policy constraints, though long-term growth may be affected by unique infrastructure needs (Caltrain grade separation).
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support Market and Investment Attractiveness Infrastructure Capacity, Needs, and Financing</i>		0.00 0.45 0.35	0.00 0.35 0.25	0.00 0.05 0.00	
7	EPS estimate of housing production given constraints		1,168	2,335	5,546			
8	Percentage of PDA 2040 housing allocation accommodated		25.1%	50.1%	119.0%			
	Summary	<p>The Rail Corridor has undergone extensive planning and development is underway on several of its key sites. The primary constraint is simply the pace at which development can be absorbed within a constrained area, as policies and infrastructure are largely supportive of the envisioned development and sites are relatively development-ready. In the out-years, the City may slow development at Bay Meadows to achieve trip generation goals, unless a Caltrain grade separation can be funded and implemented.</p> <p style="color: red;">Amended scenario assumes external funding received for grade separations so that housing development can proceed unfettered.</p>						

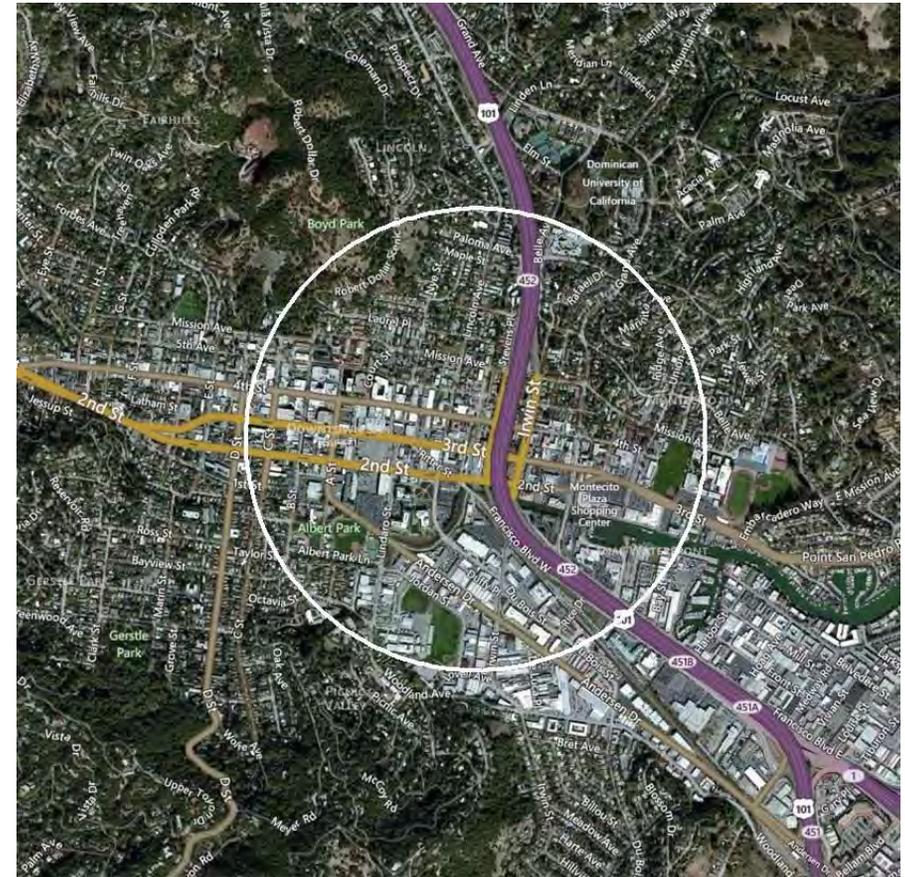
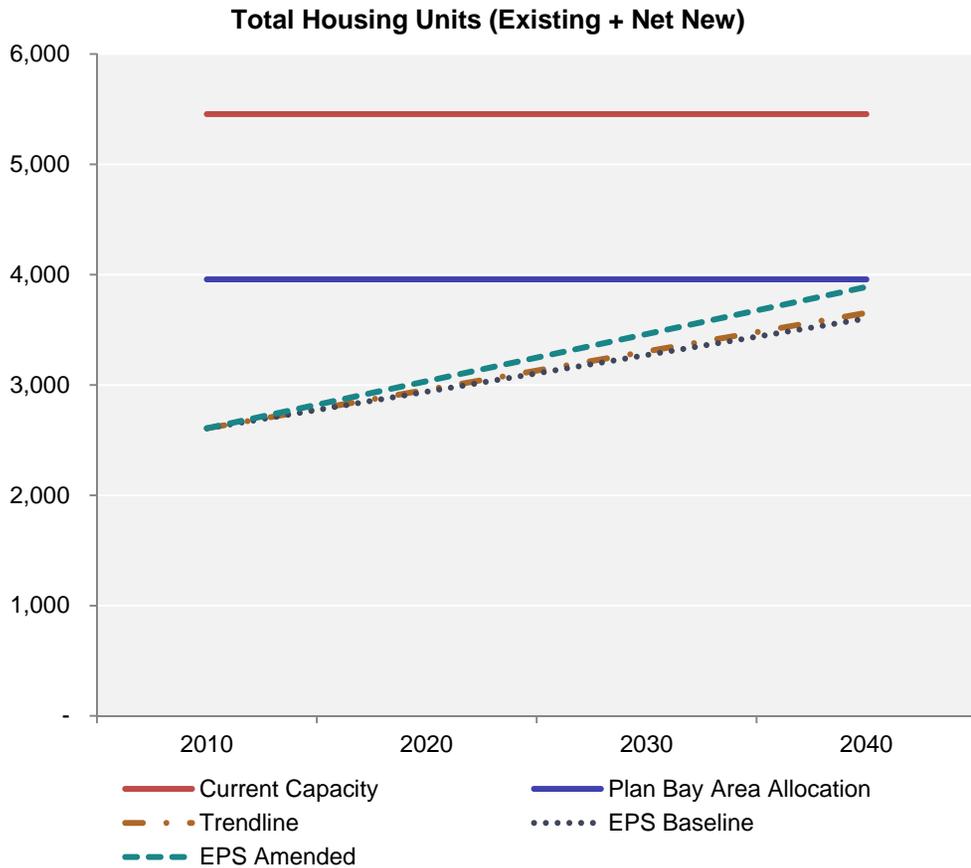
**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Rail Corridor TOD Plan and EIR adopted 2005, encouraging intensification of development and significant housing as well as commercial development on identified opportunity sites.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	None required.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Council has approved higher density housing development projects consistent with TOD Plan on multiple sites within the plan PDA.
		2	History of neighborhood opposition		0.00	0.00	0.00	City established a Citizens Advisory Committee to guide and influence the TOD Plan. No major opposition to planned development at this time.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.35	0.20	0.00	Several hundred multifamily units have been constructed in multiple projects in the Rail Corridor, including the former Police Station site and the property at Delaware and Pacific. Former Kmart site now under construction for 500 units.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Bay Meadows continues to build out and Kmart site is now under construction.
		3	General Market Conditions		0.00	0.10	0.00	San Mateo is an attractive and relatively high-value community with above-average incomes and education levels, a strong local employment base and access to regional job centers.
		4	Financial Feasibility Constraint		0.05	0.00	0.00	Home values and achievable rents are high enough to support new construction. Most of the sites in this PDA are larger redevelopment sites, but do not have significant existing uses generating cash flow requiring extraordinary values from new development. Achieving allocated housing requires relatively modest density (<30 DU/acre average) which has proven to be feasible in San Mateo
		5	Parcel size and configuration		0.05	0.05	0.05	Development sites are typically relatively large in this PDA, though some sites have unique ownership conditions requiring complex assembly initiatives.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None noted, as schools are generally good, crime is not a major issue, and access to jobs and commuter transit services is a major advantage.

**Table A-52. San Mateo: Rail Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.20	0.10	0.00	Backbone infrastructure is generally in place, except for desired grade separations for the Caltrain line. Large Bay Meadows site requires in-tract infrastructure (new smaller streets and utilities) but these are within plans and generally understood.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.05	0.00	City has impact fee program for transportation, schools, parks, housing, water/wastewater, etc., as well as financing plans for Bay Meadows itself. No plan to finance grade separation, however.
		3	PDA financing capacity		0.10	0.10	0.00	Most infrastructure costs are reasonable given the high achievable values for residential property. Primary issue is that full buildout of Bay Meadows cannot occur until grade separations for the Caltrain line are in place, and funding for this is not yet secured. This grade separation issue will affect later phases of development, not initial phases.
<p style="color: red;">Amended assumes necessary funding is made available through external sources.</p>								

# San Rafael: Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010- 2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,350	2,848	997	74%	Lack of plan and entitlement process	1,282	95%	Planning efforts undertaken to rezone area or priority areas

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,848				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,350	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,498				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,848	2,848	2,848	
		6	Sum of Capacity Constraint Coefficients		0.85	0.75	0.65	
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.25	0.25	0.25	
			<i>Market and Investment Attractiveness</i>		0.55	0.50	0.40	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		427	712	997	
		8	Percentage of PDA 2040 housing allocation accommodated		31.6%	52.7%	73.8%	
		<b>Summary</b>		The Downtown San Rafael PDA is located in the City's downtown heart and is adjacent to the future SMART rail line, linking Sonoma and Marin Counties to one another and to southbound ferry service, linking the north bay to San Francisco. While Marin County has very strong market dynamics, the area is very slow to grow, with very little new development occurring in proximity to the PDA in the last five years. While the City has achieved several policies to help facilitate development in the PDA - including a parking program that allows developments to provide an in lieu fee rather than building required parking in the area characterized by small parcels - very little new product has come to market in the PDA and in the City as a whole. The opening of the SMART may serve as a catalyst to development in the Downtown. The primary barriers to new multifamily development include a difficult entitlement process and small parcel sizes which typically include existing uses.				

**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	No Specific Plan is in place.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Not anticipated
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.05	0.05	0.05	Political support for the PDA process and for directing growth Downtown, though the entitlement process is very long and uncertain.
		2	History of neighborhood opposition		0.20	0.20	0.20	Successful and organized opposition to projects in the City.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.15	0.15	0.15	Investment in new housing in Marin County is slower than during the pre-Recession period, with permits approaching 400 in 2014, down from a peak of 700 to 1,000 during the mid-2000s. The City as a whole averaged about 140 units permitted per year between 1980 and 2014, though recent permits have not topped 10 per year. The PDA would need to average 50 units per year between 2010 and 2040 to achieve its unit-allocation, a large increase from current trends.
		2	Recent Local Development Activity (pipeline)		0.25	0.20	0.10	The Downtown area has a 40-unit project in the pipeline and commercial projects also in planning around the BioMarin center.

**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		3	General Market Conditions	0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 54% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$52,000 in 2012, compared with \$80,300 Bay Area-wide.	
		4	Financial Feasibility Constraint	0.10	0.05	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$490 per square foot for condos. These values are nearly sufficient to justify development costs for the level of density envisioned for multifamily products in the Downtown area.	
		5	Parcel size and configuration	0.05	0.10	0.15	The constrained environment will present a challenge for redevelopment, with existing uses needing to be replaced with new development.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None known.	
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity	0.00	0.00	0.00	Not known to be a constraint.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	No, though City staff have indicated some of the required improvements, such as a parking plan and additional public parking garages.	
		3	PDA financing capacity	0.00	0.00	0.00	The City charges a range of development impact fees which appear to be financeable for new development.	

**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,848				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,350	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,498				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,848	2,848	2,848	
		6	Sum of Capacity Constraint Coefficients		0.80	0.65	0.55	
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.20	0.15	0.15	
			<i>Market and Investment Attractiveness</i>		0.55	0.50	0.40	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		570	997	1,282	
		8	Percentage of PDA 2040 housing allocation accommodated		42.2%	73.8%	94.9%	
		Summary		<p>The Downtown San Rafael PDA is located in the City's downtown heart and is adjacent to the future SMART rail line, linking Sonoma and Marin Counties to one another and to southbound ferry service, linking the north bay to San Francisco. While Marin County has very strong market dynamics, the area is very slow to grow, with very little new development occurring in proximity to the PDA in the last five years. While the City has achieved several policies to help facilitate development in the PDA - including a parking program that allows developments to provide an in lieu fee rather than building required parking in the area characterized by small parcels - very little new product has come to market in the PDA and in the City as a whole. The opening of the SMART may serve as a catalyst to development in the Downtown. The primary barriers to new multifamily development include a difficult entitlement process and small parcel sizes which typically include existing uses.</p> <p>In the amended scenario, the City may successfully conduct a specific plan process or other area plan process which would put in place "development by right" zoning and streamline the entitlement process for a prioritized selection or group of parcels.</p>				

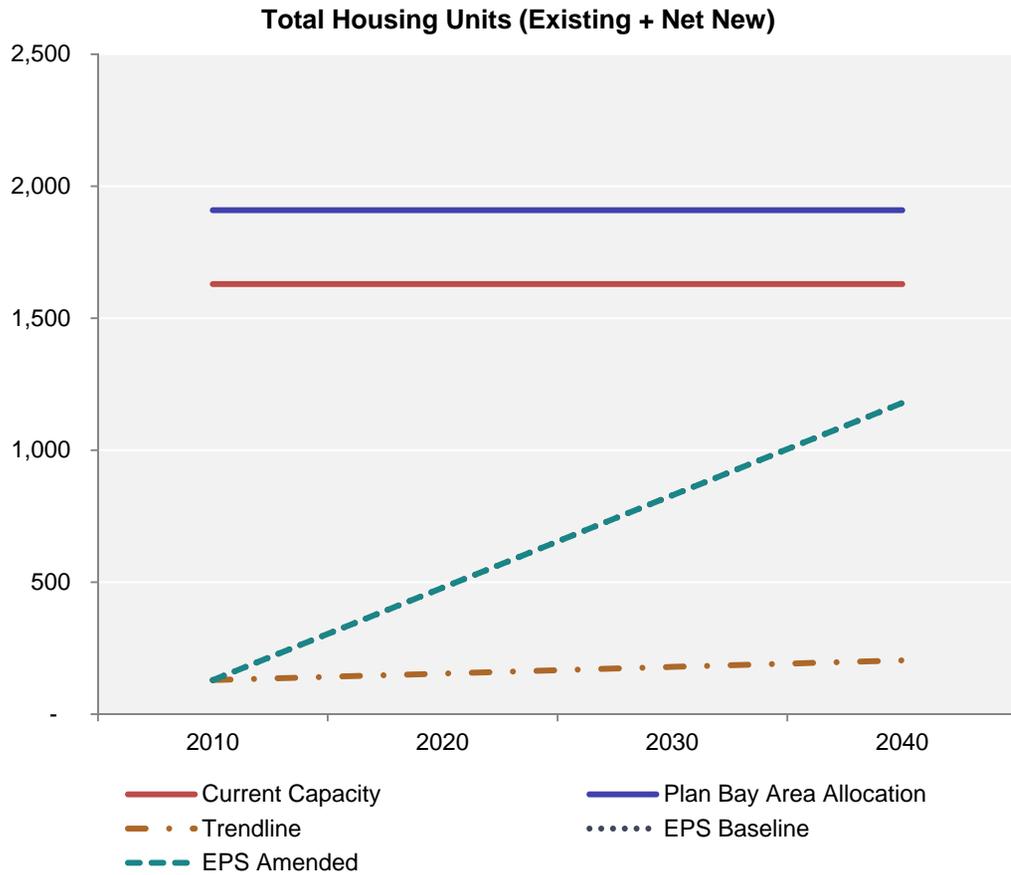
**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	No
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.05	0.05	0.05	
		2	History of neighborhood opposition		0.15	0.10	0.10	Successful and organized opposition to projects in the City.  In the amended scenario, City makes efforts to conduct an area plan or other changes may modestly reduce the level of successful community opposition to new development in the PDA.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.15	0.15	0.15	Investment in new housing in Marin County is slower than during the pre-Recession period, with permits approaching 400 in 2014, down from a peak of 700 to 1,000 during the mid-2000s. The City as a whole averaged about 140 units permitted per year between 1980 and 2014, though recent permits have not topped 10 per year. The PDA would need to average 50 units per year between 2010 and 2040 to achieve its unit-allocation, a large increase from current trends.
		2	Recent Local Development Activity (pipeline)		0.25	0.20	0.10	The Downtown area has a 40-unit project in the pipeline and commercial projects also in planning around the BioMarin center.
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and slower price-growth than Bay Area-wide sales. Educational attainment and household income of existing PDA residents indicate relatively weaker market conditions compared with Bay Area-wide conditions. The proportion of PDA residents with 4-year college degree or higher was 54% in 2012, compared with 43% Bay Area-wide. Household income in the PDA was \$52,000 in 2012, compared with \$80,300 Bay Area-wide.
		4	Financial Feasibility Constraint		0.10	0.05	0.00	Market prices in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.50 per sq.ft. per month for apartments and \$490 per square foot for condos. These values are nearly sufficient to justify development costs for the level of density envisioned for multifamily products in the Downtown area.

**Table A-53. San Rafael: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration		0.05	0.10	0.15	The constrained environment will present a challenge for redevelopment, with existing uses needing to be replaced with new development.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None known.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.00	0.00	0.00	Not known to be a constraint.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	No, though City staff have indicated some of the required improvements, such as a parking plan and additional public parking garages.
		3	PDA financing capacity		0.00	0.00	0.00	The City charges a range of development impact fees which appear to be financeable for new development.

# San Ramon: North Camino Ramon



## Net New Units - Allocation, Capacity, and Projection

PDA Name	Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
			Number	% of Total Allocation		Number	% of Total Allocation	
San Ramon: North Camino Ramon	1,780	1,500	1,050	59%	Market conditions and value of existing uses	1,050	59%	No amendments proposed

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-54. San Ramon: North Camino Ramon**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,500				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Check this out further. It may be a bit larger, depending upon how the SP is interpreted.
		2	<i>Plan Bay Area</i> new housing allocation				1,780	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(280)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,500	1,500	1,500	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.30	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.15	0.10	
		7	EPS estimate of housing production given constraints		300	600	1,050	
		8	Percentage of PDA 2040 housing allocation accommodated		16.9%	33.7%	59.0%	
			Summary	This PDA is currently a business park; the City has promoted and planned for inclusion of residential uses in the area. Market conditions and related development feasibility will limit this development in the near and mid-term.				

**Table A-54. San Ramon: North Camino Ramon**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR adopted by the City	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Approval of the Specific Plan and development in the area indicates Council support.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.00	San Ramon has long history of real estate investment and expansion.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	116 unit town home project recently approved	
		3	General Market Conditions	0.10	0.00	0.00	Market conditions in the San Ramon Valley have remained strong for traditional single family development with increasing strength for townhomes and other multi-family development.	
		4	Financial Feasibility Constraint	0.30	0.30	0.20	PDA is currently, largely, a business park; introducing residential uses will require range of physical and community development improvements. Current market prices limit investment potential given cost of displacing commercial uses	
		5	Parcel size and configuration	0.00	0.00	0.00	None.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.10	0.10	Existing infrastructure will need to be reconfigured to accommodate residential development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	City impact fees and other financing mechanisms in place	
		3	PDA financing capacity	0.00	0.00	0.00	Planned development will generate substantial financing capacity.	

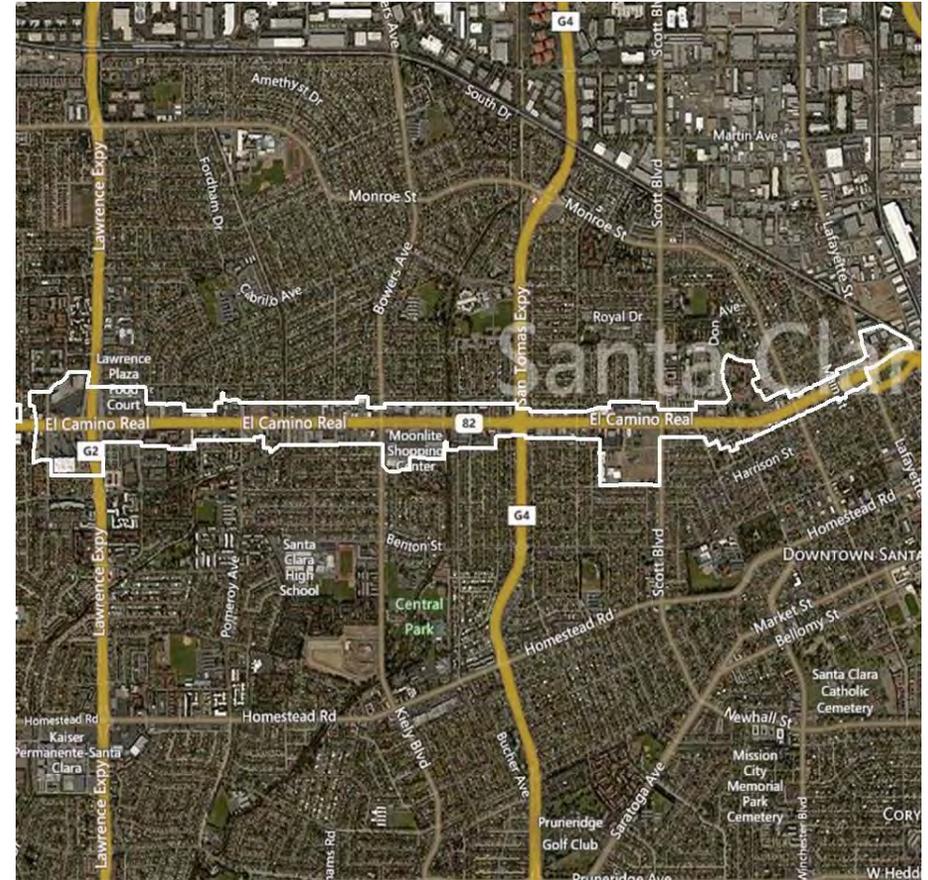
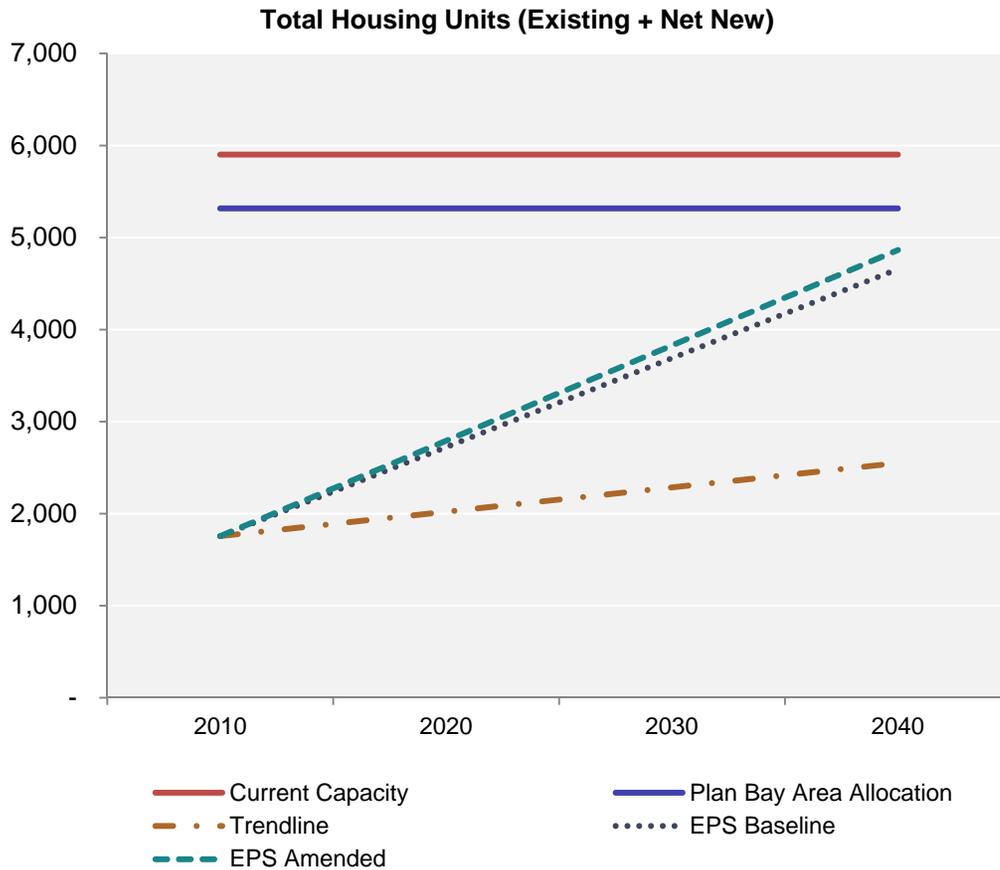
**Table A-54. San Ramon: North Camino Ramon**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,500				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				1,780	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(280)				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		1,500	1,500	1,500		
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.60	0.45	0.20		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.15	0.10		
		7	EPS estimate of housing production given constraints		300	600	1,050		
		8	Percentage of PDA 2040 housing allocation accommodated		16.9%	33.7%	59.0%		
			Summary	This PDA is currently a business park; the City has promoted and planned for inclusion of residential uses in the area. Market conditions and related development feasibility will limit this development in the near and mid-term.					
				Constraints are all market and feasibility related that will improve with time.					

**Table A-54. San Ramon: North Camino Ramon**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR adopted by the City
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Approval of the Specific Plan and development in the area indicates Council support.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.20	0.15	0.00	San Ramon has long history of real estate investment and expansion.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	116 unit town home project recently approved
		3	General Market Conditions		0.10	0.00	0.00	Market conditions in the San Ramon Valley have remained strong for traditional single family development with increasing strength for townhomes and other multi-family development.
		4	Financial Feasibility Constraint		0.30	0.30	0.20	PDA is currently, largely, a business park; introducing residential uses will require range of physical and community development improvements. Current market prices limit investment potential given cost of displacing commercial uses
		5	Parcel size and configuration		0.00	0.00	0.00	None.
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.10	Existing infrastructure will need to be reconfigured to accommodate residential development.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.05	0.00	City impact fees and other financing mechanisms in place
		3	PDA financing capacity		0.00	0.00	0.00	Planned development will generate substantial financing capacity.

# Santa Clara: El Camino Real Focus Area



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,560	4,146	2,902	82%	Infill parcelization and single-family adjacency to El Camino limit taller development	3,110	87%	Parcel assembly tools available

**Table A-55. Santa Clara: El Camino Real Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,146				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,560	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	586				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		4,146	4,146	4,146	
		6	Sum of Capacity Constraint Coefficients		0.75	0.40	0.30	
			<i>Planning and Entitlement Criteria</i>		0.10	0.05	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.30	0.25	0.25			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.10	0.05			
7	EPS estimate of housing production given constraints		1,037	2,488	2,902			
8	Percentage of PDA 2040 housing allocation accommodated		29.1%	69.9%	81.5%			
	Summary	<p>Santa Clara's El Camino Real area is an area of increasing investment interest. Instead of specific plans, the City employs a Planned Development process, whereby larger development projects undergo detailed planning to rezone the subject properties, which does not appear to deter development based upon the City's pipeline projects. While the City had traditionally approved primarily single-family homes, development in the last few years has tilted strongly towards multifamily development, similar to trends around much of Silicon Valley. While market indicators and General Plan designations are generally favoring achievement of the PDA allocation, parcel assembly and site availability is likely to become a problem in the out years of the projection. In addition, the need for improved transit service will become more acute local and regional plans for improvements like Bus Rapid Transit have stalled. These limitations on parcel availability and broad, circulation questions result in a projection below the 2040 allocation.</p>						

**Table A-55. Santa Clara: El Camino Real Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.10	0.05	0.00	Instead of specific plans, the City employs a Planned Development process, whereby larger development projects undergo detailed planning to rezone the subject properties. The General Plan also has "phasing" associated with its horizon period, with some areas transiting to higher-intensity uses in later years. The El Camino Real generally has a Community Mixed-Use designation.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	A limited amount of residential displacement may occur as older buildings along the corridor are redeveloped for multifamily buildings but this circumstance is not anticipated to halt redevelopment.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Elected officials have generally been supportive of densification efforts along the corridor.
		2	History of neighborhood opposition		0.00	0.00	0.00	The community has not generally been opposed to the types of densities sought along El Camino. Densities proposed typically respond to the concerns of single-family neighborhoods adjacent to the corridor.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.05	0.00	Investment in new housing in Santa Clara County and the City of Santa Clara has been strong in the post-Recession recovery. The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average about 110 units per year between 2000 and 2040 to achieve its unit-allocation. The two PDAs in the City would need to average more than 240 units per year to reach the 2040 allocation. Multifamily housing starts in Santa Clara have comprised 75% of total housing starts since 1980. Overall, investment in the City's real estate has mirrored trends in the County but have lagged the Bay Area as a whole. While overall investment in the City has been strong, El Camino Real sites have been slow to redevelop.

**Table A-55. Santa Clara: El Camino Real Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	2	Recent Local Development Activity (pipeline)		0.05	0.00	0.00	The residential development pipeline and recently completed projects includes about 800 units among 7 different projects
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Incomes and educational attainment are at or above the Bay Area average and population within the PDA has growth more quickly than the Bay Area as a whole.
		4	Financial Feasibility Constraint		0.05	0.05	0.05	Market prices for multifamily homes in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.60 per sq.ft. per month for apartments and \$600 per square foot for condos. These prices are sufficient to justify development costs. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades. While market prices are not a financial feasibility constraint, the area is developed and redevelopment will require that land prices exceed the economic value of land which is currently in use as residential and commercial uses.
		5	Parcel size and configuration		0.10	0.15	0.20	Parcel size and configuration is the major constraint in this PDA. Parcel sizes are small, shallow, and about single-family neighborhoods. This constraint is likely to increase over the period as the larger and more developable sites are redeveloped.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives exist in the PDA.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.20	0.00	0.00	The City notes the need for sewer and water upgrades, as well as complete streets improvements. Other needed infrastructure includes additional transit service, anticipated to be addressed by VTA.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.15	0.10	0.05	The City is the water utility provider for customers within Santa Clara. Water supplies include an underground aquifer (~60%) purchases from the Santa Clara Valley Water District and the San Francisco Hetch Hetchy System (~25%), and recycled water from the South Bay Recycled Water Facility (~15%). The City does not have a comprehensive plan for increasing water supply to meet growth in the City.
		3	PDA financing capacity		0.00	0.00	0.00	New development under current and anticipated market prices would be able to finance development impact and other City fees covering public facilities.

**Table A-55. Santa Clara: El Camino Real Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,146				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				3,560	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	586					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		4,146	4,146	4,146		
		6	Sum of Capacity Constraint Coefficients		0.70	0.35	0.25		
			<i>Planning and Entitlement Criteria</i>		0.10	0.05	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.25	0.20	0.20				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.10	0.05				
7	EPS estimate of housing production given constraints			1,244	2,695	3,110			
8	Percentage of PDA 2040 housing allocation accommodated			34.9%	75.7%	87.3%			
		Summary	<p>Santa Clara's El Camino Real area is an area of increasing investment interest. Instead of specific plans, the City employs a Planned Development process, whereby larger development projects undergo detailed planning to rezone the subject properties, which does not appear to deter development based upon the City's pipeline projects. While the City had traditionally approved primarily single-family homes, development in the last few years has tilted strongly towards multifamily development, similar to trends around much of Silicon Valley. While market indicators and General Plan designations are generally favoring achievement of the PDA allocation, parcel assembly and site availability is likely to become a problem in the out years of the projection. In addition, the need for improved transit service will become more acute local and regional plans for improvements like Bus Rapid Transit have stalled. These limitations on parcel availability and broad, circulation questions result in a projection below the 2040 allocation.</p> <p style="color: red;">In the amended scenario, parcel assembly tools are available to prepare additional sites for redevelopment.</p>						

**Table A-55. Santa Clara: El Camino Real Focus Area**

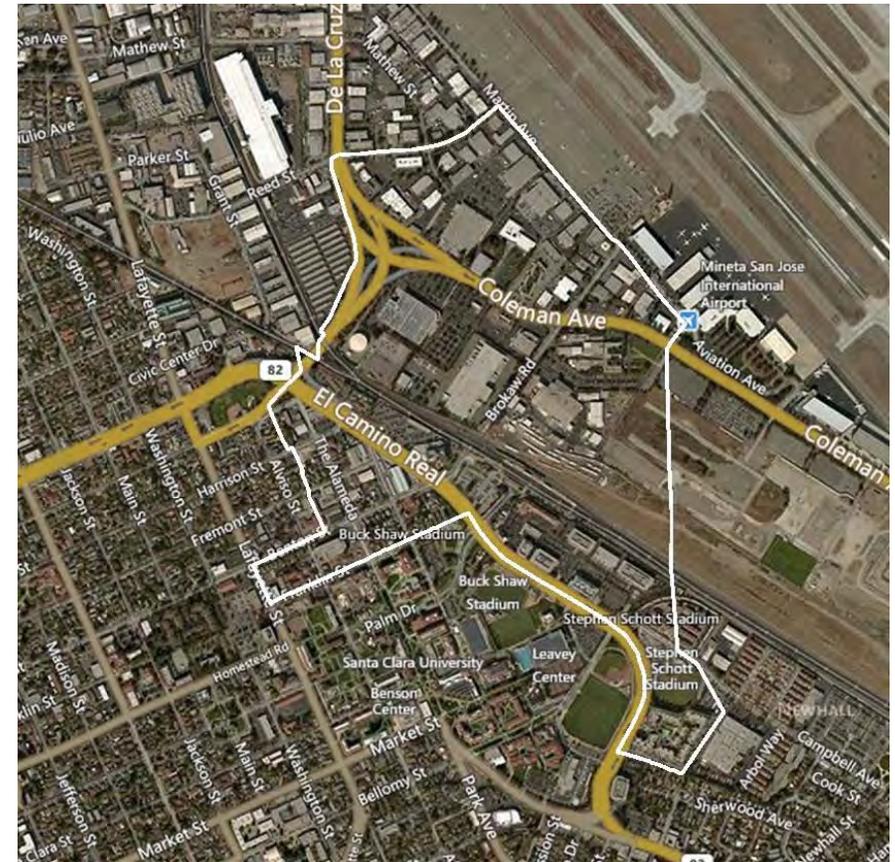
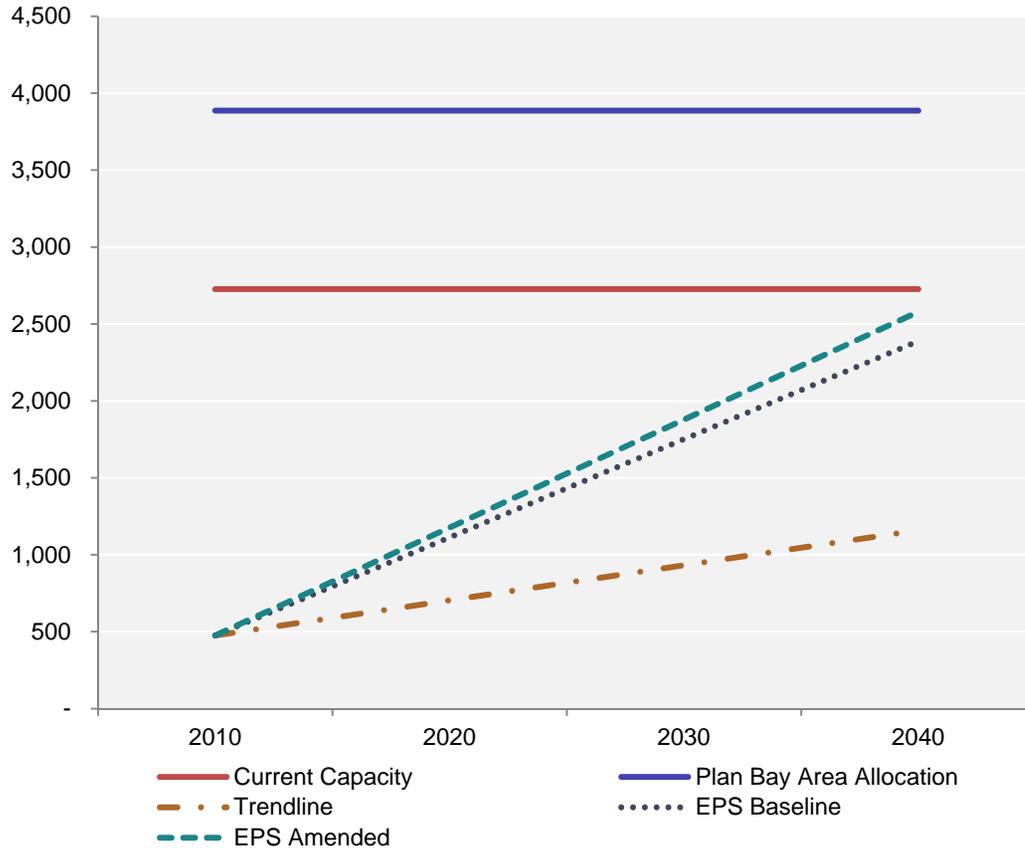
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.10	0.05	0.00	Instead of specific plans, the City employs a Planned Development process, whereby larger development projects undergo detailed planning to rezone the subject properties. The General Plan also has "phasing" associated with its horizon period, with some areas transiting to higher-intensity uses in later years. The El Camino Real generally has a Community Mixed-Use designation.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	A limited amount of residential displacement may occur as older buildings along the corridor are redeveloped for multifamily buildings but this circumstance is not anticipated to halt redevelopment.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Elected officials have generally been supportive of densification efforts along the corridor.
		2	History of neighborhood opposition		0.00	0.00	0.00	The community has not generally been opposed to the types of densities sought along El Camino. Densities proposed typically respond to the concerns of single-family neighborhoods adjacent to the corridor.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.05	0.00	Investment in new housing in Santa Clara County and the City of Santa Clara has been strong in the post-Recession recovery. The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average about 110 units per year between 2000 and 2040 to achieve its unit-allocation. The two PDAs in the City would need to average more than 240 units per year to reach the 2040 allocation. Multifamily housing starts in Santa Clara have comprised 75% of total housing starts since 1980. While overall investment in the City has been strong, El Camino Real sites have been slow to redevelop.
		2	Recent Local Development Activity (pipeline)		0.05	0.00	0.00	The residential development pipeline and recently completed projects includes about 800 units among 7 different projects
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Incomes and educational attainment are at or above the Bay Area average and population within the PDA has growth more quickly than the Bay Area as a whole.

**Table A-55. Santa Clara: El Camino Real Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	4	Financial Feasibility Constraint		0.05	0.05	0.05	Market prices for multifamily homes in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.60 per sq.ft. per month for apartments and \$600 per square foot for condos. These prices are sufficient to justify development costs. Though financial feasibility is a constraint now, market conditions in the area are improving and this constraint is expected to lessen in subsequent decades. While market prices are not a financial feasibility constraint, the area is developed and redevelopment will require that land prices exceed the economic value of land which is currently in use as residential and commercial uses.
		5	Parcel size and configuration		0.05	0.10	0.15	Parcel size and configuration is the major constraint in this PDA. Parcel sizes are small, shallow, and abut single-family neighborhoods. This constraint is likely to increase over the period as the larger and more developable sites are redeveloped.  <i>In the amended scenario, parcel assembly tools increase the number of sites for redevelopment.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives exist in the PDA.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.20	0.00	0.00	The City notes the need for sewer and water upgrades, as well as complete streets improvements. Other needed infrastructure includes additional transit service, anticipated to be addressed by VTA.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.15	0.10	0.05	The City is the water utility provider for customers within Santa Clara. Water supplies include an underground aquifer (~60%) purchases from the Santa Clara Valley Water District and the San Francisco Hetch Hetchy System (~25%), and recycled water from the South Bay Recycled Water Facility (~15%). The City does not have a comprehensive plan for increasing water supply to meet growth in the City.
		3	PDA financing capacity		0.00	0.00	0.00	New development under current and anticipated market prices would be able to finance development impact and other City fees covering public facilities.

# Santa Clara: Santa Clara Station Focus Area

Total Housing Units (Existing + Net New)



## Net New Units - Allocation, Capacity, and Projection

PDA Name	Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
			Number	% of Total Allocation		Number	% of Total Allocation	
Santa Clara: Santa Clara Station Focus Area	3,410	2,250	1,913	56%	Limited sites, existing value of uses, and transit infrastructure needs	2,104	62%	Expanded capacity through rezoning

**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,250				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,410	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,160)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,250	2,250	2,250	
		6	Sum of Capacity Constraint Coefficients		0.80	0.30	0.15	
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.15	0.05	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.15	0.10	
		7	EPS estimate of housing production given constraints		450	1,575	1,913	
		8	Percentage of PDA 2040 housing allocation accommodated		13.2%	46.2%	56.1%	
			Summary	The Santa Clara Station Focus area is anticipated to be the nexus of several transit operators, including existing Caltrain, Altamont Commuter Express, and VTA bus lines along with future BART and an airport people mover service. Plan Bay Area includes and prioritizes some of these investments already. California High Speed Rail is planned to travel through the area and Amtrak currently runs trains through the site. These services will make the Station Area as an important intermodal location in the City and region, but some services are still many years from full operation. The PDA is developed with big box retail, office, hotel, industrial, and public facilities. There are not currently any major projects in the pipeline for the PDA. Transition of the PDA to include a significant number of higher-intensity uses will require a catalyst project, which is likely to be VTA/BART's investment in a new station or could arrive more incrementally as sites near the Caltrain station are redeveloped.				

**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	The Santa Clara Station Plan is an Area Plan - characterized as general and long-range - which has been incorporated into the City's General Plan. No EIR analysis beyond that which is required to adopt the General Plan has been conducted. This lack of specific guidance in an area where intensification of uses has not yet been driven by the market alone is anticipated to impede or at least not promote higher density development
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Existing residential neighborhoods are not anticipated to be displaced in the PDA.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Elected officials have generally been supportive of densification efforts in the Station Area.
		2	History of neighborhood opposition		0.00	0.00	0.00	The community has not generally been opposed to the types of densities proposed in the Station Area Focus planning efforts.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.05	0.00	Investment in new housing in Santa Clara County and the City of Santa Clara has been strong in the post-Recession recovery. The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average about 115 units per year between 2000 and 2040 to achieve its unit-allocation. The two PDAs in the City would need to average more than 240 units per year to reach the 2040 allocation. Multifamily housing starts in Santa Clara have comprised 75% of total housing starts since 1980. While overall investment in the City has been strong, more dense development in the Station Area will require improvements in access for the site, as the PDA boundaries cross the Caltrain rail.
		2	Recent Local Development Activity (pipeline)		0.25	0.00	0.00	No projects are currently in the pipeline.
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Incomes and educational attainment are at or above the Bay Area average and population within the PDA has growth more quickly than the Bay Area as a whole.
		4	Financial Feasibility Constraint		0.15	0.10	0.05	Market prices for multifamily homes in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.60 per sq.ft. per month for apartments and \$550 per square foot for condos. These prices are sufficient to justify development costs. While market prices are not a financial feasibility constraint, the area is developed and redevelopment will require that land prices exceed the economic value of land which is currently in use as office parks and large retail sites.

**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Parcel sizes are relatively large.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives exist in the PDA.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.00	0.00	The City notes the need for sewer and water upgrades.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.15	0.10	0.05	The City is the water utility provider for customers within Santa Clara. Water supplies include an underground aquifer (~60%) purchases from the Santa Clara Valley Water District and the San Francisco Hetch Hetchy System (~25%), and recycled water from the South Bay Recycled Water Facility (~15%). The City does not have a comprehensive plan for increasing water supply to meet growth in the City.
		3	PDA financing capacity		0.05	0.05	0.05	There is a need for various transportation and circulation improvements to connect the portions of the PDA between the train tracks and the airport. The Santa Clara Station area is envisioned as nexus of Caltrain, VTA/BART, and future Bus Rapid Transit. With the VTA/BART construction not yet scheduled and some communities along the potential Bus Rapid Transit route indicating a desire for a non-dedicated lane for BRT, the future mobility and connectivity of the site is currently in flux.

**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,250				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				3,410	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(1,160)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	Assume an increase in capacity as planning and redevelopment in the area occurs, particularly after the opening of anticipated transit improvements (BART, potentially BRT, etc.)
		5	Estimated gross housing capacity at each period		2,250	2,250	2,475	
		6	Sum of Capacity Constraint Coefficients		0.80	0.30	0.15	
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.50	0.15	0.05			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.15	0.10			
7	EPS estimate of housing production given constraints			450	1,575	2,104		
8	Percentage of PDA 2040 housing allocation accommodated			13.2%	46.2%	61.7%		
		Summary	<p>The Santa Clara Station Focus area is anticipated to be the nexus of several transit operators, including existing Caltrain, Altamont Commuter Express, and VTA bus lines along with future BART and an airport people mover service. <i>Plan Bay Area</i> includes and prioritizes some of these investments already. California High Speed Rail is planned to travel through the area and Amtrak currently runs trains through the site. These services will make the Station Area as an important intermodal location in the City and region, but some services are still many years from full operation. The PDA is developed with big box retail, office, hotel, industrial, and public facilities. There are not currently any major projects in the pipeline for the PDA. Transition of the PDA to include a significant number of higher-intensity uses will require a catalyst project, which is likely to be VTA/BART's investment in a new station or could arrive more incrementally as sites near the Caltrain station are redeveloped.</p> <p>In the amended scenario, modest planning modifications increase capacity in the PDA. However, the limited capacity on opportunity sites continues to constrain development projections.</p>					

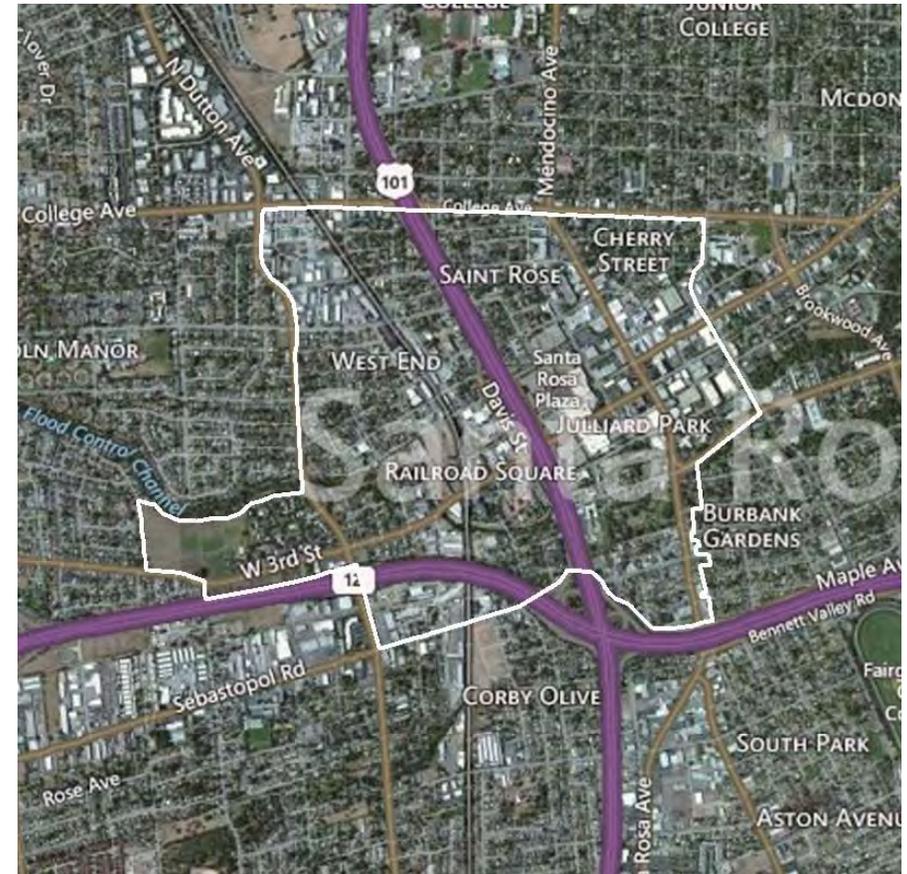
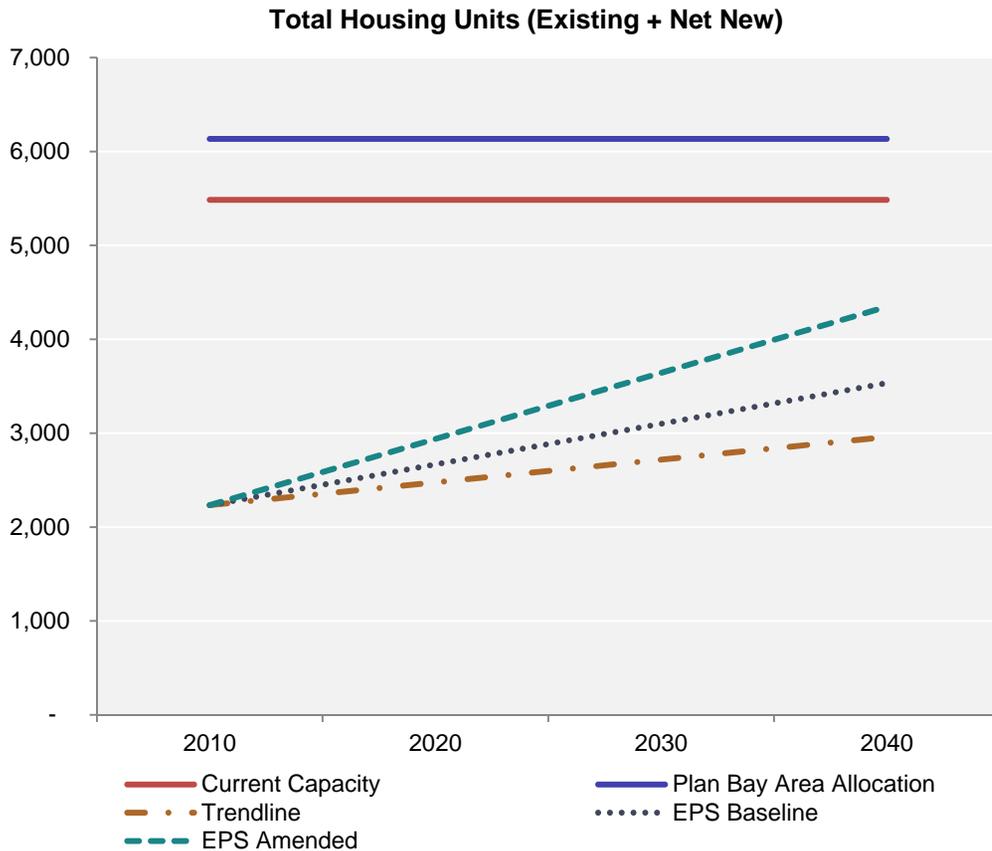
**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.05	0.00	0.00	The Santa Clara Station Plan is an Area Plan - characterized as general and long-range - which has been incorporated into the City's General Plan. No EIR analysis beyond that which is required to adopt the General Plan has been conducted. This lack of specific guidance in an area where intensification of uses has not yet been driven by the market alone is anticipated to impede or at least not promote higher density development
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	Existing residential neighborhoods are not anticipated to be displaced in the PDA.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Elected officials have generally been supportive of densification efforts in the Station Area.
		2	History of neighborhood opposition		0.00	0.00	0.00	The community has not generally been opposed to the types of densities proposed in the Station Area Focus planning efforts.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.10	0.05	0.00	Investment in new housing in Santa Clara County and the City of Santa Clara has been strong in the post-Recession recovery. The City as a whole averaged about 400 units permitted per year between 1990 and 2013. The PDA would need to average about 115 units per year between 2000 and 2040 to achieve its unit-allocation. The two PDAs in the City would need to average more than 240 units per year to reach the 2040 allocation. Multifamily housing starts in Santa Clara have comprised 75% of total housing starts since 1980. While overall investment in the City has been strong, more dense development in the Station Area will require improvements in access for the site, as the PDA boundaries cross the Caltrain rail.
		2	Recent Local Development Activity (pipeline)		0.25	0.00	0.00	No projects are currently in the pipeline.
		3	General Market Conditions		0.00	0.00	0.00	Compared to condo pricing Bay Area-wide, recent sales in the zip codes nearest the PDA indicate higher sales prices and faster price-growth than Bay Area-wide sales. Incomes and educational attainment are at or above the Bay Area average and population within the PDA has growth more quickly than the Bay Area as a whole.
		4	Financial Feasibility Constraint		0.15	0.10	0.05	Market prices for multifamily homes in the City or nearest zip codes to the PDA, as of early 2015, averaged: \$2.60 per sq.ft. per month for apartments and \$550 per square foot for condos. These prices are sufficient to justify development costs. While market prices are not a financial feasibility constraint, the area is developed and redevelopment will require that land prices exceed the economic value of land which is currently in use as office parks and large retail sites.

**Table A-56. Santa Clara: Santa Clara Station Focus Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
D.	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Parcel sizes are relatively large.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No major disincentives exist in the PDA.
E.	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.00	0.00	The City notes the need for sewer and water upgrades.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.15	0.10	0.05	The City is the water utility provider for customers within Santa Clara. Water supplies include an underground aquifer (~60%) purchases from the Santa Clara Valley Water District and the San Francisco Hetch Hetchy System (~25%), and recycled water from the South Bay Recycled Water Facility (~15%). The City does not have a comprehensive plan for increasing water supply to meet growth in the City.
		3	PDA financing capacity		0.05	0.05	0.05	There is a need for various transportation and circulation improvements to connect the portions of the PDA between the train tracks and the airport. The Santa Clara Station area is envisioned as nexus of Caltrain, VTA/BART, and future Bus Rapid Transit. With the VTA/BART construction not yet scheduled and some communities along the potential Bus Rapid Transit route indicating a desire for a non-dedicated lane for BRT, the future mobility and connectivity of the site is currently in flux.

# Santa Rosa: Downtown Station Area



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,900	3,250	1,300	33%	Market conditions and infrastructure needs	2,113	54%	Improved financing strategy

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-57. Santa Rosa: Downtown Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,250				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				3,900	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(650)					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		3,250	3,250	3,250		
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.60		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i> <i>Market and Investment Attractiveness</i> <i>Infrastructure Capacity, Needs, and Financing</i>		0.00 0.65 0.30	0.00 0.40 0.30	0.00 0.25 0.35		
7	EPS estimate of housing production given constraints		162	975	1,300				
8	Percentage of PDA 2040 housing allocation accommodated		4.2%	25.0%	33.3%				
		Summary	The Downtown Station Area PDA has ample opportunity sites. Market factors, including demand and pricing for multifamily development in the area and proportionately high development costs will limit development potential in the near and mid-term.						

**Table A-57. Santa Rosa: Downtown Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and Program EIR in place	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Continual support by Council	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.30	0.10	0.05	Market conditions for all types of development in the Santa Rosa remain weak with very little new development occurring in recent post-Recession period.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Recent development proposal activity indicates potential for future development as pricing continues to improve	
		3	General Market Conditions	0.10	0.10	0.00	General market conditions in Santa Rosa remain weak in the post-Recession period. Pricing for both for-sale and rental housing remains below that necessary to stimulate substantial construction.	
		4	Financial Feasibility Constraint	0.20	0.10	0.10	Weak pricing and site-related and cost constraints for mixed use/multifamily development creates feasibility constraint.	
		5	Parcel size and configuration	0.05	0.10	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.10	0.15	0.15	Infrastructure capacity improvements needed to support additional residential development including improvement to wet utilities and drainage and street improvements	
		2	Is there an existing CIP funded or other infrastructure financing plan in	0.00	0.00	0.00	Yes, though funding capacity will limit utility of the adopted measures.	
		3	PDA financing capacity	0.20	0.15	0.20	Financing capacity limited by the likely slow pace of development and high development costs in relationship to expected pricing.	

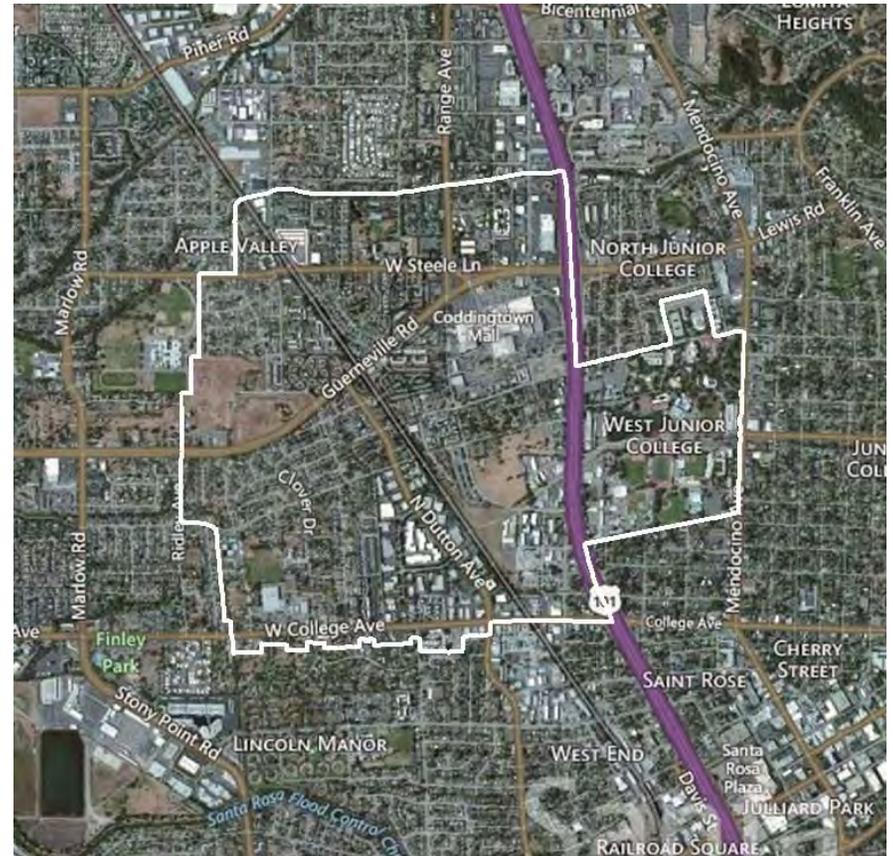
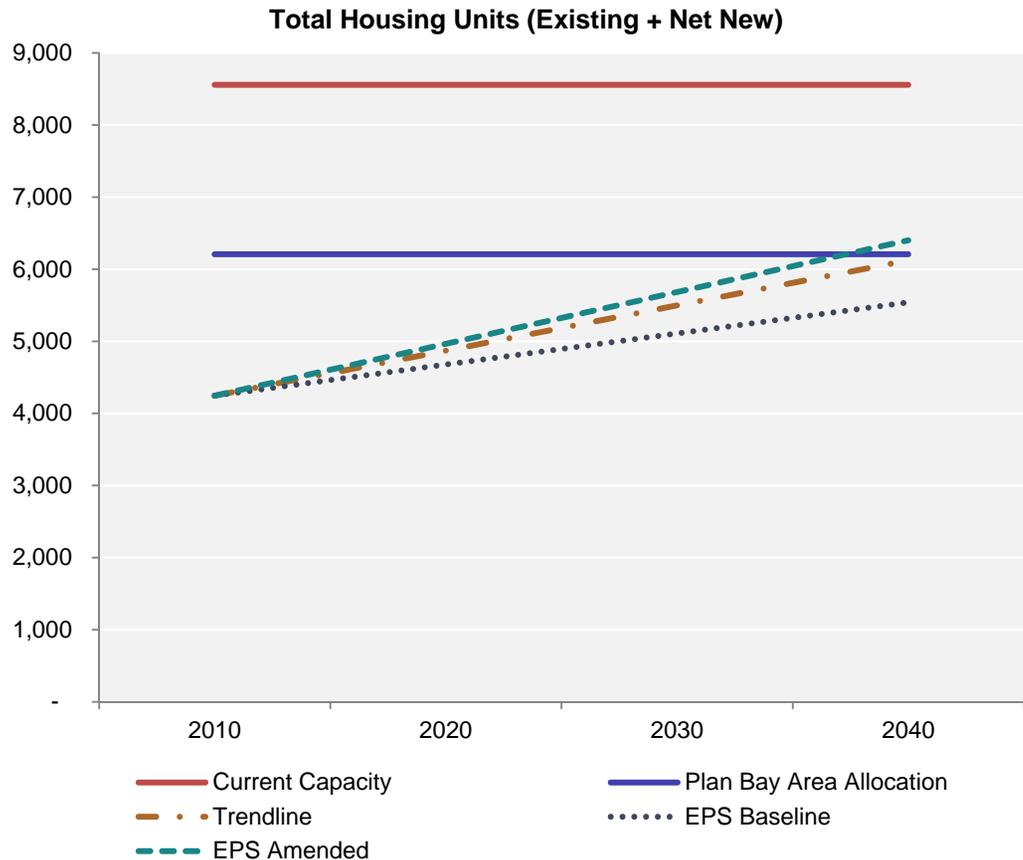
**Table A-57. Santa Rosa: Downtown Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	3,250				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation			3,900		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(650)				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		3,250	3,250	3,250	
		6	Sum of Capacity Constraint Coefficients		0.95	0.70	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.65	0.40	0.25			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.30	0.10			
7	EPS estimate of housing production given constraints		162	975	2,113			
8	Percentage of PDA 2040 housing allocation accommodated		4.2%	25.0%	54.2%			
Summary			The Downtown Station Area PDA has ample opportunity sites. Market factors, including demand and pricing for multifamily development in the area and proportionately high development costs will limit development potential in the near and mid-term.					
			Financing plan and strategy created. Financing capacity improves with development.					

**Table A-57. Santa Rosa: Downtown Station Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and Program EIR in place
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Continual support by Council
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.10	0.05	Market conditions for all types of development in the Santa Rosa remain weak with very little new development occurring in recent post-Recession period.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Recent development proposal activity indicates potential for future development as pricing continues to improve
		3	General Market Conditions		0.10	0.10	0.00	General market conditions in Santa Rosa remain weak in the post-Recession period. Pricing for both for-sale and rental housing remains below that necessary to stimulate substantial construction.
		4	Financial Feasibility Constraint		0.20	0.10	0.10	Weak pricing and site-related and cost constraints for mixed use/multifamily development creates feasibility constraint.
		5	Parcel size and configuration		0.05	0.10	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.15	0.10	Infrastructure capacity improvements needed to support additional residential development including improvement to wet utilities and drainage and street improvements
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Yes, though funding capacity will limit utility of the adopted measures.  Financing plan and strategy created.
		3	PDA financing capacity		0.20	0.15	0.00	Financing capacity limited by the likely slow pace of development and high development costs in relationship to expected pricing.  Financing capacity improves with development.

# Santa Rosa: North Santa Rosa Station



## Net New Units - Allocation, Capacity, and Projection

PDA Name	Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
			Number	% of Total Allocation		Number	% of Total Allocation	
Santa Rosa: North Santa Rosa Station	1,960	4,310	1,293	66%	Market conditions and infrastructure needs	2,155	110%	improved external infrastructure financing strategy

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-58. Santa Rosa: North Santa Rosa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,310				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,960	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,350				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		4,310	4,310	4,310	
		6	Sum of Capacity Constraint Coefficients		0.90	0.80	0.70	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.40	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.40	0.50	
		7	EPS estimate of housing production given constraints		431	862	1,293	
		8	Percentage of PDA 2040 housing allocation accommodated		22.0%	44.0%	66.0%	
		Summary		The North Santa Rosa Station Area PDA has ample opportunity sites. Market factors, including demand and pricing for multifamily development in the area and proportionately high development costs and the need for substantial infrastructure improvements will limit development potential in the near and mid-term.				

**Table A-58. Santa Rosa: North Santa Rosa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR adopted.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
		3	Time required and difficulty in obtaining entitlement: institutional capacity and jurisdictional track record	0.00	0.00	0.00	City is recovering from staff losses that occurred during Recession and will be improving development processing capacities.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support for infill multifamily development indicated by specific plan approvals	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.25	0.15	0.10	Market conditions for all types of development in the Santa Rosa remain weak with very little new development occurring in recent post-Recession period.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Limited development activity in recent years.	
		3	General Market Conditions	0.10	0.10	0.00	General market conditions in Santa Rosa remain weak in the post-Recession period. Pricing for both for-sale and rental housing remains below that necessary to stimulate substantial construction.	
		4	Financial Feasibility Constraint	0.20	0.10	0.00	Weak pricing and site-related and cost constraints for mixed use/multifamily development creates feasibility constraint.	
		5	Parcel size and configuration	0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.20	0.25	Development of the area will require substantial improvements to existing infrastructure	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.10	0.05	Specific Plan does not include realistic measures for funding infrastructure.	
		3	PDA financing capacity	0.10	0.10	0.20	Real estate value created may be insufficient to cover all needed infrastructure costs.	

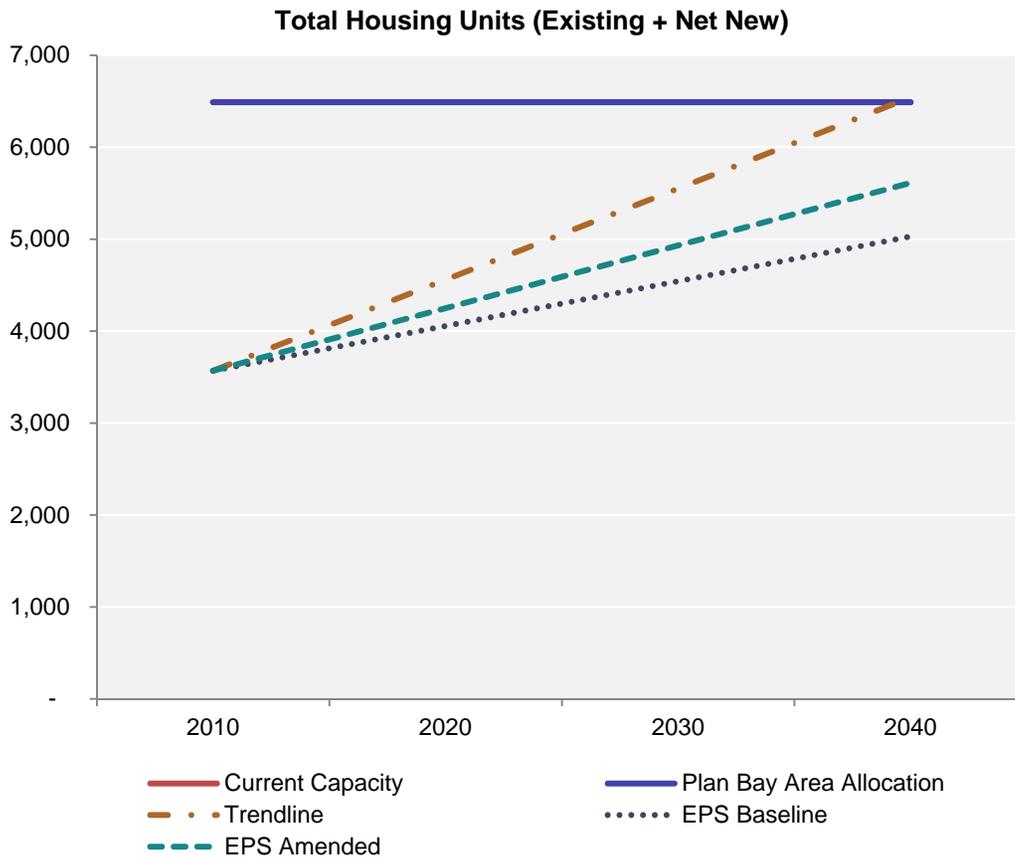
**Table A-58. Santa Rosa: North Santa Rosa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,310				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,960	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,350				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		4,310	4,310	4,310	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.55	0.35	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.35	0.35	0.35	
		7	EPS estimate of housing production given constraints		431	1,293	2,155	
		8	Percentage of PDA 2040 housing allocation accommodated		22.0%	66.0%	109.9%	
		<b>Summary</b>		The North Santa Rosa Station Area PDA has ample opportunity sites. Market factors, including demand and pricing for multifamily development in the area and proportionately high development costs and the need for substantial infrastructure improvements will limit development potential in the near and mid-term.				
				Infrastructure capacity improved by city and development-related investment. Additional financing sources and strategies brought to bear.				

**Table A-58. Santa Rosa: North Santa Rosa Station**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR adopted.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support for infill multifamily development indicated by specific plan approvals	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.25	0.10	0.10	Market conditions for all types of development in the Santa Rosa remain weak with very little new development occurring in recent post-Recession period.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Limited development activity in recent years.	
		3	General Market Conditions	0.10	0.10	0.00	General market conditions in Santa Rosa remain weak in the post-Recession period. Pricing for both for-sale and rental housing remains below that necessary to stimulate substantial construction.	
		4	Financial Feasibility Constraint	0.20	0.10	0.00	Weak pricing and site-related and cost constraints for mixed use/multifamily	
		5	Parcel size and configuration	0.00	0.05	0.05	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.00	0.00	0.00	No.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.15	0.20	0.20	Development of the area will require substantial improvements to existing infrastructure.  Infrastructure capacity improved by city and development-related investment.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.00	Specific Plan does not include realistic measures for funding infrastructure.	
		3	PDA financing capacity	0.10	0.10	0.15	Real estate value created may be insufficient to cover all needed infrastructure costs.  Additional financing sources and strategies brought to bear.	

# Santa Rosa: Roseland



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,920	2,920	1,460	50%	Market conditions and infrastructure needs	2,044	70%	Parcel assembly tools and improved infrastructure financing strategies

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-59. Santa Rosa: Roseland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,920				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation			2,920		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,920	2,920	2,920	
		6	Sum of Capacity Constraint Coefficients		0.90	0.70	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.45	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.25	0.30	
		7	EPS estimate of housing production given constraints		292	876	1,460	
		8	Percentage of PDA 2040 housing allocation accommodated		10.0%	30.0%	50.0%	
			Summary	This PDA is largely an existing unincorporated residential area surrounded by the City of Santa Rosa. There are opportunity sites however market conditions and local factors will inhibit short and mid-term development				

**Table A-59. Santa Rosa: Roseland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR under preparation
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	A limited amount of displacement will be required but generally of existing very low quality housing with better quality units
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support for infill multifamily development indicated by specific plan approvals
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.15	0.00	Market conditions for all types of development in the Santa Rosa remain weak with very little new development occurring in recent post-Recession period.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	None.
		3	General Market Conditions		0.10	0.10	0.00	Poor market conditions have prevailed in Santa Rosa and in the Southwest Area in particular during and following the Recession. The Roseland Area suffers from deficient infrastructure and social factors that limit its market potential and investment attractiveness.
		4	Financial Feasibility Constraint		0.20	0.15	0.10	There will be extraordinary costs affecting some parcels due to remediation and wetland mitigation constraints
		5	Parcel size and configuration		0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid
		6	Existence of major investment disincentives		0.00	0.00	0.00	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.10	0.15	Existing infrastructure is not adequate to serve existing let alone new development.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.10	0.05	Specific Plan will include financing plan and City, as part of annexation is cooperating with the County to address infrastructure deficiencies.
		3	PDA financing capacity		0.00	0.05	0.10	Financing capacity will be limited by slow pace of development.

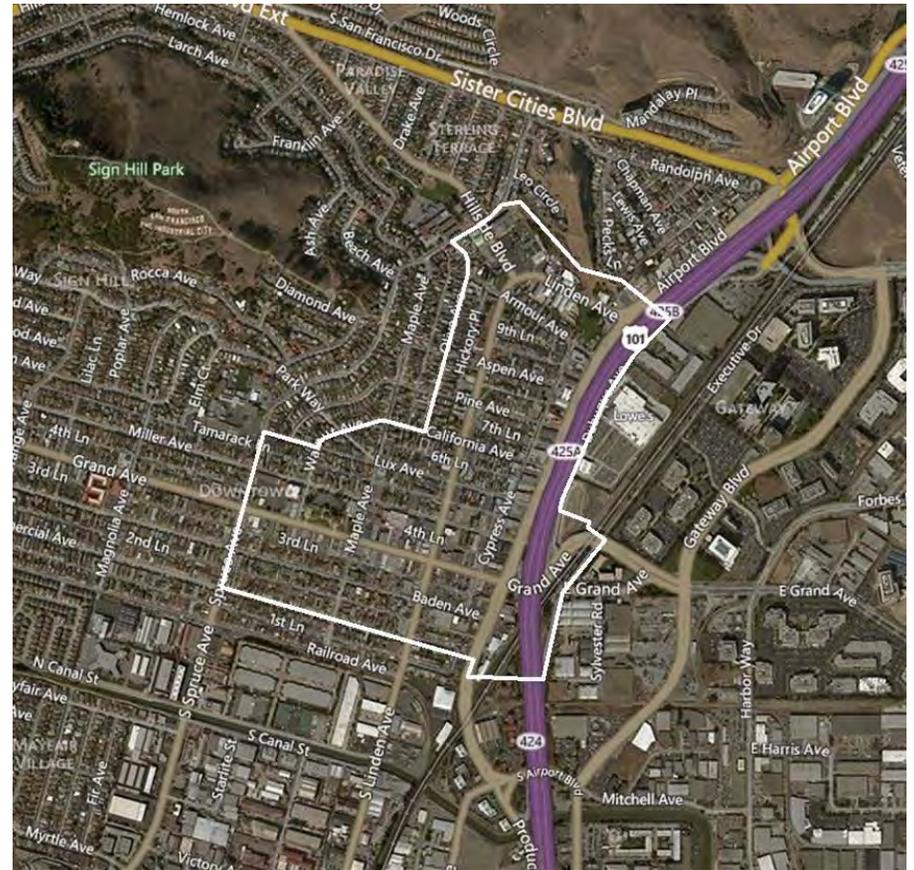
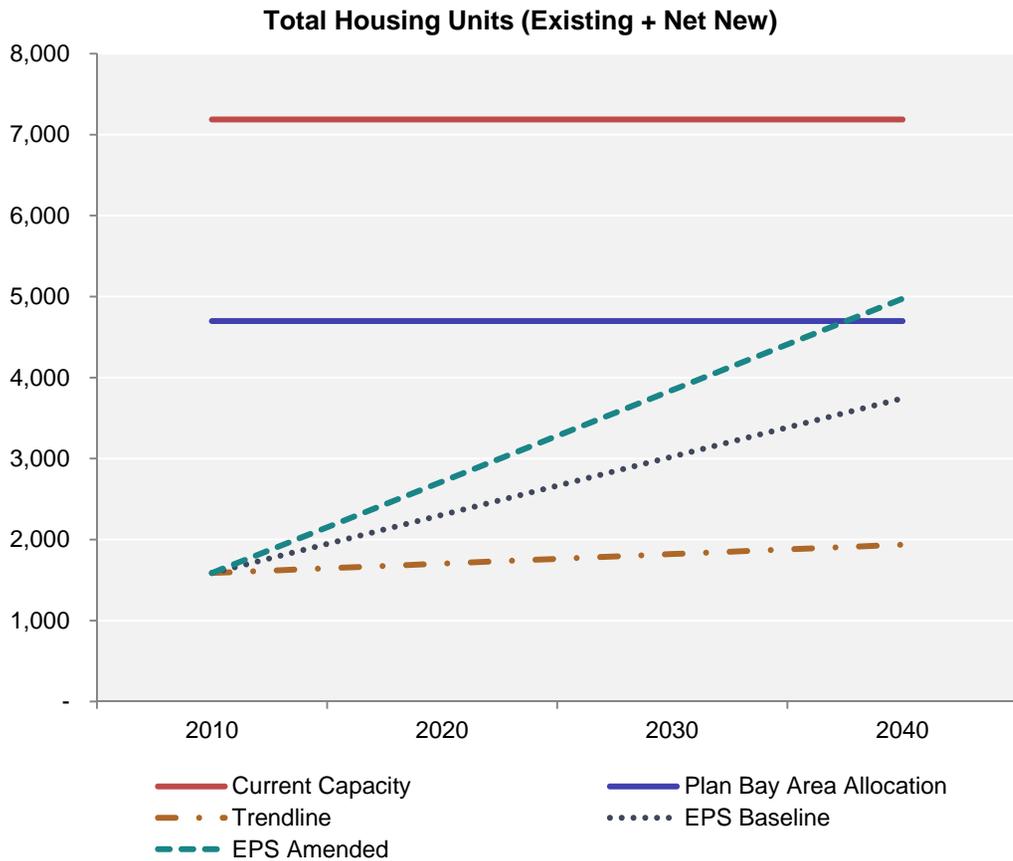
**Table A-59. Santa Rosa: Roseland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,920				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,920	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		2,920	2,920	2,920		
		6	Sum of Capacity Constraint Coefficients		0.90	0.60	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.70	0.40	0.10		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.20	0.20	0.20		
		7	EPS estimate of housing production given constraints		292	1,168	2,044		
		8	Percentage of PDA 2040 housing allocation accommodated		10.0%	40.0%	70.0%		
			Summary	This PDA is largely an existing unincorporated residential area surrounded by the City of Santa Rosa. There are opportunity sites however market conditions and local factors will inhibit short and mid-term development.					
				City efforts to assemble and ready development parcels are successful. City investments in upgrades to existing infrastructure are accomplished through broad-based funding initiatives.					

**Table A-59. Santa Rosa: Roseland**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR under preparation
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	A limited amount of displacement will be required but generally of existing very low quality housing with better quality units
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support for infill multifamily development indicated by specific plan approvals
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.15	0.00	Only limited development in recent years in the PDA or the City as a whole.
		2	Recent Local Development Activity (pipeline)		0.10	0.00	0.00	None
		3	General Market Conditions		0.10	0.10	0.00	Poor market conditions have prevailed in Santa Rosa and in the Southwest Area in particular during and following the Recession. The Roseland Area suffers from deficient infrastructure and social factors that limit its market potential and investment attractiveness.
		4	Financial Feasibility Constraint		0.20	0.10	0.05	There will be extraordinary costs affecting some parcels due to remediation and wetland mitigation constraints
		5	Parcel size and configuration		0.00	0.05	0.05	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <i>City efforts to assemble and ready development parcels are successful.</i>
		6	Existence of major investment disincentives		0.00	0.00	0.00	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.10	0.05	0.00	Existing infrastructure is not adequate to serve existing let alone new development.  <i>City investments in upgrades to existing infrastructure are accomplished through broad-based funding initiatives.</i>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.10	0.10	Specific Plan will include financing plan and City, as part of annexation is cooperating with the County to address infrastructure deficiencies.
		3	PDA financing capacity		0.00	0.05	0.10	Financing capacity will be limited by slow pace of development.

# South San Francisco: Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
3,110	5,600	2,156	69%	Site availability, EIR capacity limits, and reliance on higher-density construction	3,388	109%	Updated EIR, parcel assembly tools, and external infrastructure funding

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-60. South San Francisco: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,600				Downtown Plan and EIR includes up to 1,400 residential units, but this is only 25% of Downtown Plan buildout. So, total buildout allowance would sum to 5,600 units, according to City.
		2	<i>Plan Bay Area</i> new housing allocation			3,110		This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,490				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	City is already discussing potential for supplemental studies to increase residential zoning in some areas of Plan. EPS assumes this may occur in 15+ years.
		5	Estimated gross housing capacity at each period		5,600	5,600	6,160	
		6	Sum of Capacity Constraint Coefficients		0.85	0.70	0.65	
			<i>Planning and Entitlement Criteria</i>		0.00	0.05	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.70	0.55	0.50			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.10			
7	EPS estimate of housing production given constraints		840	1,680	2,156			
8	Percentage of PDA 2040 housing allocation accommodated		27.0%	54.0%	69.3%			
	<b>Summary</b>	This PDA has undergone extensive planning for intensification, and has received funding for major transit access improvements. Market values are strong due to proximity to job centers. Historic pace of development has been modest, but is expected to improve now that planning has advanced. Current EIR does not allow as much development as allocated, but could be supplemented and physical supply is thought to be adequate at maximum densities. Those maximum densities face feasibility challenges, however, and EPS considers it likely that projects will be more feasible at lower than maximum densities.						

**Table A-60. South San Francisco: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.05	0.05	Downtown Station Area Specific Plan and EIR adopted February 2015. Development exceeding 25% of total plan buildout would require a supplemental EIR.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	City does not anticipate significant displacement of residential use, but for any such displacement, mitigation strategies will be required.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council just adopted Specific Plan and EIR with very high density allowances, and has previously approved projects up to 80 DU/acre elsewhere in City (BART station, Mid-Pen, etc.)	
		2	History of neighborhood opposition	0.00	0.00	0.00	Not considered problematic, but stakeholder turnout is improving. Plan received support from labor, residents, and business interests.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.50</b>	<b>0.45</b>	<b>0.35</b>	City has added ~1800 units since 2000, but none in this PDA. City indicates many PDA projects were awaiting Plan adoption, as evidenced by quick pipeline growth.	
		2	Recent Local Development Activity (pipeline)	<b>0.05</b>	0.00	0.00	5 projects summing to 520 units (rental, MF) submitted since plan adopted in 2015.	
		3	General Market Conditions	0.00	0.00	0.00	Housing prices have been strong, enhanced by proximity to major job centers within South San Francisco, San Francisco, and the Peninsula	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Some developable parcels were purchased by RDA for redevelopment, now being developed as part of pipeline. Other sites are substantial in size and have low-intensity commercial uses that should be relatively easy to redevelop. CD+A identified about 23 acres of developable land, which would require densities of roughly 140 units/acre to reach allocation. EPS expects Type V product would be feasible, but Type I may face challenges, so we have discounted feasibility.	

**Table A-60. South San Francisco: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration	0.00	0.00	<b>0.05</b>	Some parcel assembly has already occurred under RDA, and not all opportunity sites are small parcels. Still, early sites will be those most easily developed.	
		6	Existence of major investment disincentives	<b>0.05</b>	0.00	0.00	Schools are decent; problematic access to Caltrain station that is planned for improvement (\$55M funded by JPA to start in 2017); crime has been an increasing issue in recent years. Downtown Plan and continued development are expected to lessen these issues over time.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Downtown Plan identifies storm drain inefficiencies, water line upgrades, roadways, streetscape, bike/ped improvements summing to ~\$146M.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	<b>0.05</b>	0.00	0.00	Some CIP funding, parking district, impact fees for traffic, localized improvements from development projects. Caltrain station improvements being funded through JPA. Also, seeking grant funding from federal, State, and County sources.	
		3	PDA financing capacity	<b>0.05</b>	<b>0.05</b>	<b>0.05</b>	Relatively high unit values may be able to support significant costs, but City is also seeking external funding sources. Sharing costs among residential and substantial planned non-residential growth could yield reasonable cost burden for new housing.	

**Table A-60. South San Francisco: Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	5,600				Downtown Plan and EIR includes up to 1,400 residential units, but this is only 25% of Downtown Plan buildout. So, total buildout allowance would sum to 5,600 units, according to City.
		2	<i>Plan Bay Area</i> new housing allocation				3,110	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	2,490				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	10%	City is already discussing potential for supplemental studies to increase residential zoning in some areas of Plan. EPS assumes this may occur in 15+ years.
		5	Estimated gross housing capacity at each period		5,600	5,600	6,160	
		6	Sum of Capacity Constraint Coefficients		0.85	0.70	0.45	
			<i>Planning and Entitlement Criteria</i>		0.00	0.05	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.70	0.55	0.45	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.15	0.10	0.00	
		7	EPS estimate of housing production given constraints		840	1,680	3,388	
		8	Percentage of PDA 2040 housing allocation accommodated		27.0%	54.0%	108.9%	
			Summary	This PDA has undergone extensive planning for intensification, and has received funding for major transit access improvements. Market values are strong due to proximity to job centers. Historic pace of development has been modest, but is expected to improve now that planning has advanced. Current EIR does not allow as much development as allocated, but could be supplemented and physical supply is thought to be adequate at maximum densities. Those maximum densities face feasibility challenges, however, and EPS considers it likely that projects will be more feasible at lower than maximum densities. <b>Amended scenario assumes new EIR is undertaken to increase zoning, parcel assembly tools are restored, and external funding for infrastructure is secured.</b>				

**Table A-60. South San Francisco: Downtown**

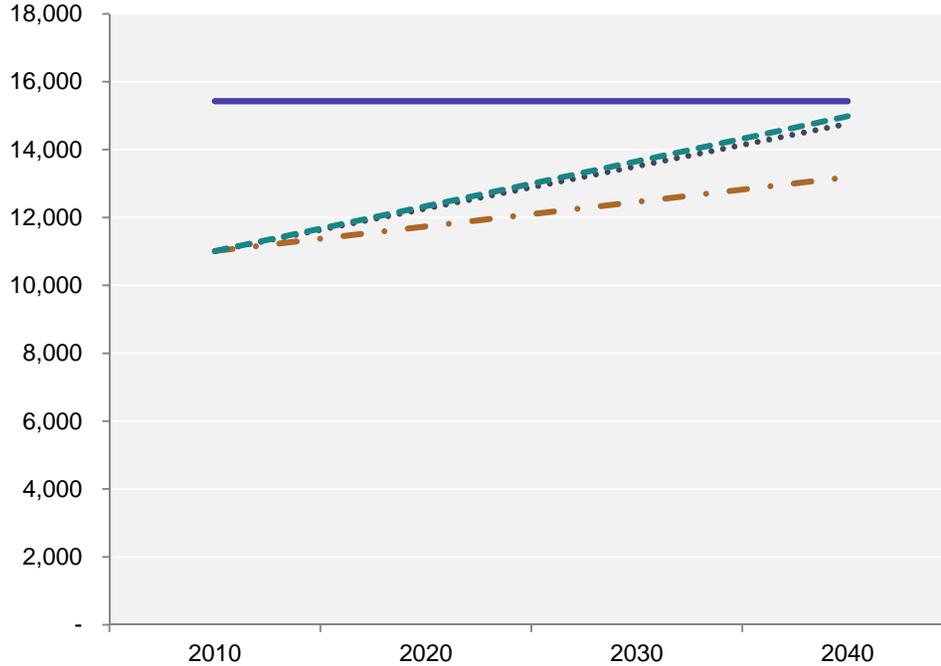
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.05	0.00	Downtown Station Area Specific Plan and EIR adopted February 2015. Development exceeding 25% of total plan buildout would require a supplemental EIR. <b>Amended assumes new EIR is undertaken to increase allowable buildout nearer the area's capacity at maximum densities on all sites.</b>	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	City does not anticipate significant displacement of residential use, but for any such displacement, mitigation strategies will be required.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council just adopted Specific Plan and EIR with very high density allowances, and has previously approved projects up to 80 DU/acre elsewhere in City (BART station, Mid-Pen, etc.)	
		2	History of neighborhood opposition	0.00	0.00	0.00	Not considered problematic, but stakeholder turnout is improving. Plan received support from labor, residents, and business interests.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.50</b>	<b>0.45</b>	<b>0.35</b>	City has added ~1800 units since 2000, but none in this PDA. City indicates many PDA projects were awaiting Plan adoption, as evidenced by quick pipeline growth.	
		2	Recent Local Development Activity (pipeline)	<b>0.05</b>	0.00	0.00	5 projects summing to 520 units (rental, MF) submitted since plan adopted in 2015.	
		3	General Market Conditions	0.00	0.00	0.00	Housing prices have been strong, enhanced by proximity to major job centers within South San Francisco, San Francisco, and the Peninsula	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.10</b>	<b>0.10</b>	Some developable parcels were purchased by RDA for redevelopment, now being developed as part of pipeline. Other sites are substantial in size and have low-intensity commercial uses that should be relatively easy to redevelop. CD+A identified about 23 acres of developable land, which would require densities of roughly 140 units/acre to reach allocation. EPS expects Type V product would be feasible, but Type I may face challenges, so we have discounted feasibility.	
		5	Parcel size and configuration	0.00	0.00	0.00	Some parcel assembly has already occurred under RDA, and not all opportunity sites are small parcels. Still, early sites will be those most easily developed. <b>Amended scenario assumes restoration of parcel assembly tools will alleviate this constraint.</b>	
		6	Existence of major investment disincentives	<b>0.05</b>	0.00	0.00	Schools are decent; problematic access to Caltrain station that is planned for improvement (\$55M funded by JPA to start in 2017); crime has been an increasing issue in recent years. Downtown Plan and continued development are expected to lessen these issues over time.	

**Table A-60. South San Francisco: Downtown**

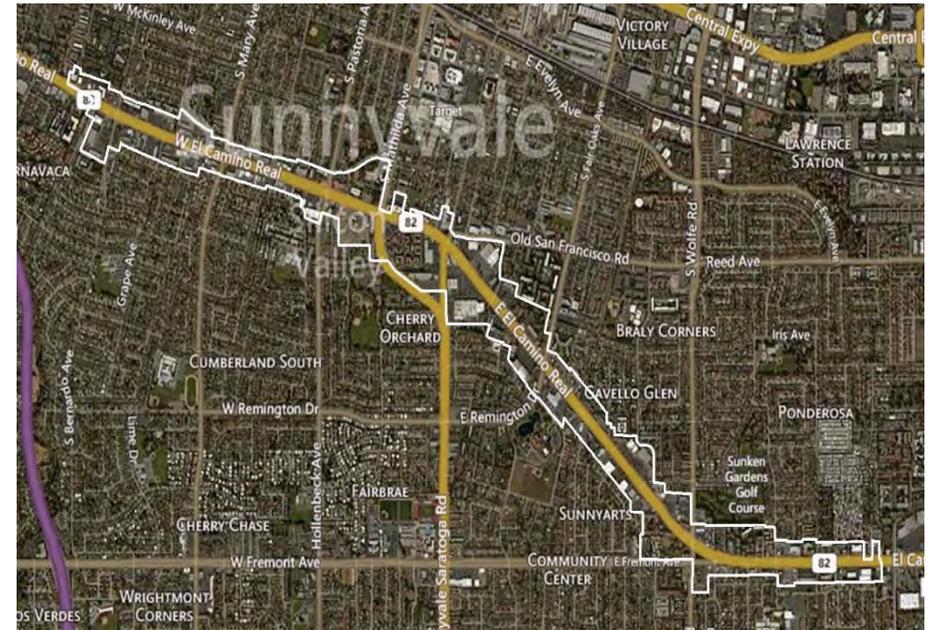
Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity		0.05	0.05	0.00	Downtown Plan identifies storm drain inefficiencies, water line upgrades, roadways, streetscape, bike/ped improvements summing to ~\$146M. <b>Amended scenario assumes external funding is secured to address this constraint.</b>
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.05	0.00	0.00	Some CIP funding, parking district, impact fees for traffic, localized improvements from development projects. Caltrain station improvements being funded through JPA. Also, seeking grant funding from federal, State, and County sources.
		3	PDA financing capacity		0.05	0.05	0.00	Relatively high unit values may be able to support significant costs, but City is also seeking external funding sources. Sharing costs among residential and substantial planned non-residential growth could yield reasonable cost burden for new housing. <b>Amended scenario assumes external funding is secured to address this constraint.</b>

# Sunnyvale: El Camino Real Corridor

Total Housing Units (Existing + Net New)



- Current Capacity
- Trendline
- - - EPS Amended
- Plan Bay Area Allocation
- ..... EPS Baseline



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
4,410	4,410	3,749	85%	Infill parcelization	3,969	90%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,410				City indicates current Land Use and Transportation Element (LUTE) should be able to accommodate 4,410 units as allocated by Plan Bay Area
		2	<i>Plan Bay Area</i> new housing allocation				4,410	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Though Specific Plan is underway, City does not anticipate major increases of allowable density.
		5	Estimated gross housing capacity at each period		4,410	4,410	4,410	
		6	Sum of Capacity Constraint Coefficients		0.85	0.45	0.15	Constraints include need for redevelopment of productive uses, and parcel sizes/configurations.
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.80	0.45	0.15	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		662	2,426	3,749	Figures assume diminishing ability to achieve optimal density over time, as the most readily developable sites will occur earlier.
		8	Percentage of PDA 2040 housing allocation accommodated		15.0%	55.0%	85.0%	
			Summary	Very strong market and supportive policies in place, plus upcoming Specific Plan/EIR should facilitate development entitlement process. Primary long-term constraint is the size and configuration of many parcels, which may require difficult assembly and/or may not yield the full allowable density.				

**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	<b>0.05</b>	0.00	0.00	City is beginning a Specific Plan and EIR for this PDA, with expectations they'll be complete in 2016.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	PDA Corridor is now defined primarily as parcels fronting El Camino Real; does not reach significantly into established neighborhoods	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	ECR Precise Plan was adopted in 2007, prioritized dense, mixed-use "nodes" at major intersections; Council has approved projects consistent with PDA density goals.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Adjacent neighborhoods have expressed typical concerns about density/traffic impacts, loss of commercial space, impacts on school capacity and parks. No major opposition to development yet, however, and PDA projects have been gaining approvals.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	<b>0.55</b>	<b>0.30</b>	0.00	Cherry Orchard project added ~350 units and development on former Chevrolet site added 103 townhomes; City overall has been averaging 300-400 new units annually over the past 15 years and PDA would need to average ~150 DU/yr from 2010-2040.	
		2	Recent Local Development Activity (pipeline)	<b>0.10</b>	0.00	0.00	316 units currently in pipeline, ranging from SFD to multifamily apartments	
		3	General Market Conditions	0.00	0.00	0.00	Significant developer interest in denser residential (rental) projects on larger sites (2+ acres); not much vacancy on ECR; high incomes and rents in area, and access to job centers is a major advantage.	
		4	Financial Feasibility Constraint	<b>0.10</b>	<b>0.05</b>	0.00	Few true vacancies and most properties producing some cashflow with low risk; concern about feasibility of mixed-use commercial component, but may be feasible if 40+ DU/acre; redevelopment of existing uses poses problem (several auto dealerships that City doesn't want to lose); Safeway refused to add residential at Mathilda	

**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		<b>0.05</b>	<b>0.10</b>	<b>0.15</b>	Many shallower parcels require buffer to SFD neighborhoods and require assembly for efficiency. Constraint expected to increase over time as more easily developed sites go first.
		6	Existence of major investment disincentives		0.00	0.00	0.00	No significant issues: schools are fine, crime not a major issue, strong community. Complaints about lack of clarity in development regulations being addressed in upcoming Specific Plan.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	BRT in Specific Plan, but in shared-traffic lanes so no major improvements expected. Some concerns about traffic congestion, but City has shown some willingness to accept lower levels of service to accommodate growth.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Has traffic impact fees, affordable housing, parks, and school fees. Specific Plan may determine additional needs and recommend implementation measures.
		3	PDA financing capacity		0.00	0.00	0.00	Not a major issue due to expected modest infrastructure needs and strong market values.

**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,410				City indicates current Land Use and Transportation Element (LUTE) should be able to accommodate 4,410 units as allocated by Plan Bay Area
		2	<i>Plan Bay Area</i> new housing allocation				4,410	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	0				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Though Specific Plan is underway, City does not anticipate major increases of allowable density.
		5	Estimated gross housing capacity at each period		4,410	4,410	4,410	
		6	Sum of Capacity Constraint Coefficients		0.85	0.45	0.10	Constraints include need for redevelopment of productive uses, and parcel sizes/configurations.
			<i>Planning and Entitlement Criteria</i>		0.05	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.80	0.45	0.10	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		662	2,426	3,969	Figures assume diminishing ability to achieve optimal density over time, as the most readily developable sites will occur earlier.
		8	Percentage of PDA 2040 housing allocation accommodated		15.0%	55.0%	90.0%	
			Summary	Very strong market and supportive policies in place, plus upcoming Specific Plan/EIR should facilitate development entitlement process. Primary long-term constraint is the size and configuration of many parcels, which may require difficult assembly and/or may not yield the full allowable density. <b>Amended scenario assumes parcel assembly tools are restored but make only a modest improvement to this situation.</b>				

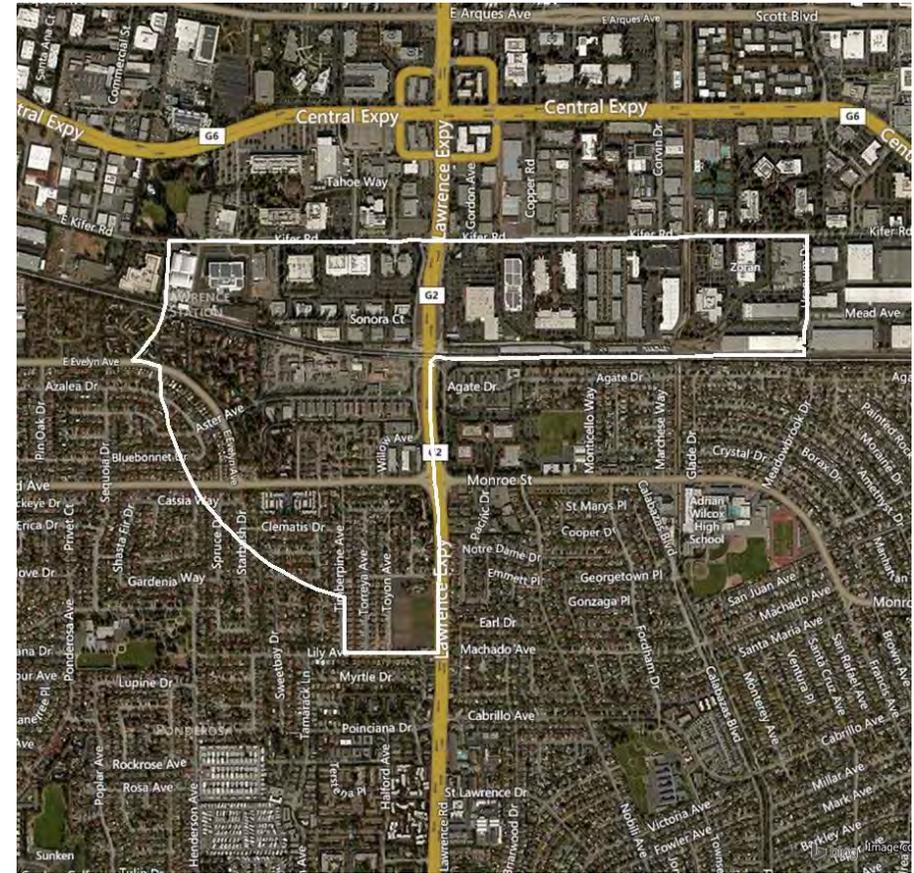
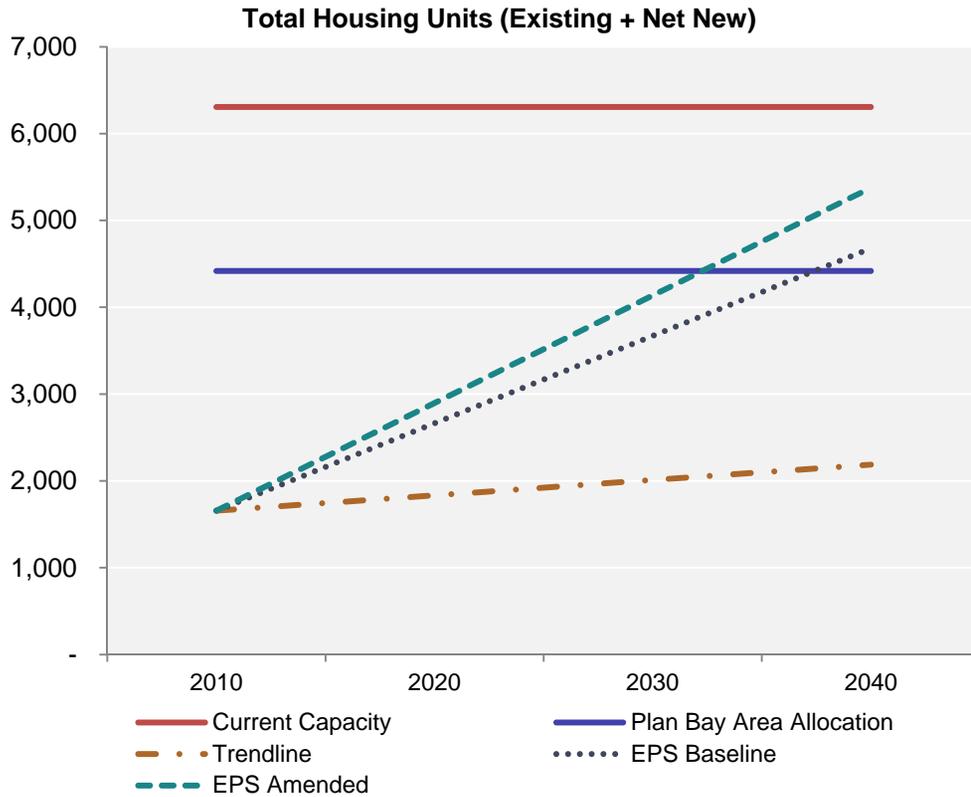
**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods		<b>0.05</b>	0.00	0.00	City is beginning a Specific Plan and EIR for this PDA, with expectations they'll be complete in 2016.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	PDA Corridor is now defined primarily as parcels fronting El Camino Real; does not reach significantly into established neighborhoods
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	ECR Precise Plan was adopted in 2007, prioritized dense, mixed-use "nodes" at major intersections; Council has approved projects consistent with PDA density goals.
		2	History of neighborhood opposition		0.00	0.00	0.00	Adjacent neighborhoods have expressed typical concerns about density/traffic impacts, loss of commercial space, impacts on school capacity and parks. No major opposition to development yet, however, and PDA projects have been gaining approvals.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		<b>0.55</b>	<b>0.30</b>	0.00	Cherry Orchard project added ~350 units and development on former Chevrolet site added 103 townhomes; City overall has been averaging 300-400 new units annually over the past 15 years and PDA would need to average ~150 DU/yr from 2010-2040.
		2	Recent Local Development Activity (pipeline)		<b>0.10</b>	0.00	0.00	316 units currently in pipeline, ranging from SFD to multifamily apartments
		3	General Market Conditions		0.00	0.00	0.00	Significant developer interest in denser residential (rental) projects on larger sites (2+ acres); not much vacancy on ECR; high incomes and rents in area, and access to job centers is a major advantage.

**Table A-61. Sunnyvale: El Camino Real Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
		4	Financial Feasibility Constraint		0.10	0.05	0.00	Few true vacancies and most properties producing some cashflow with low risk; concern about feasibility of mixed-use commercial component, but may be feasible if 40+ DU/acre; redevelopment of existing uses poses problem (several auto dealerships that City doesn't want to lose); Safeway refused to add residential at Mathilda
		5	Parcel size and configuration		0.05	0.10	0.10	Many shallower parcels require buffer to SFD neighborhoods and require assembly for efficiency. Constraint expected to increase over time as more easily developed sites go first. <b>Amended scenario assumes parcel assembly tools are restored but make only a modest improvement to this situation.</b>
		6	Existence of major investment disincentives		0.00	0.00	0.00	No significant issues: schools are fine, crime not a major issue, strong community. Complaints about lack of clarity in development regulations being addressed in upcoming Specific Plan.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	BRT in Specific Plan, but in shared-traffic lanes so no major improvements expected. Some concerns about traffic congestion, but City has shown some willingness to accept lower levels of service to accommodate growth.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Has traffic impact fees, affordable housing, parks, and school fees. Specific Plan may determine additional needs and recommend implementation measures.
		3	PDA financing capacity		0.00	0.00	0.00	Not a major issue due to expected modest infrastructure needs and strong market values.

# Sunnyvale: Lawrence Station Transit Village



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,760	4,649	3,022	109%	EIR based on sub-optimal density, would require amendment	3,719	135%	EIR amended

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,649				Lawrence Station Area Plan shows capacity for up to 4,649 units in Sunnyvale portion of plan area, but assumes "likely" buildout of 2,326 units.
		2	<i>Plan Bay Area</i> new housing allocation				2,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,889				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recent plan and EIR (to be complete in 2015) suggest major upzoning is unlikely.
		5	Estimated gross housing capacity at each period		4,649	4,649	4,649	
		6	Sum of Capacity Constraint Coefficients		0.85	0.60	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.10	0.15	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.85	0.50	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		697	1,860	3,022	Expect area will achieve its allocation due to strong demand, supportive policies, and reasonable infrastructure needs.
		8	Percentage of PDA 2040 housing allocation accommodated		25.3%	67.4%	109.5%	
		<b>Summary</b>		Station Area Plan and EIR are nearly complete, and allow for significant housing development. Market is strong and parcels are largely developable, and infrastructure needs appear to be supportable. Council may elect to slow housing growth in future if employment goals are not being met, but strong commercial market suggests this may not be a major concern. Achieving full housing allocation would require a modest EIR amendment in the future.				

**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.10	0.15	Station Area Plan and EIR scheduled for completion by the end of 2015. EIR assumes buildout at 50% of overall plan capacity; would need to amend EIR if exceeding that amount. Also, plan seeks balance of jobs and housing, and may allow Council to suspend housing development awhile if growth is unbalanced.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Plan shows future housing growth on non-residential parcels only.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has been supportive of rezoning this currently industrial area to allow significant housing development, and has approved several small housing projects proposed.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Community has generally supported Specific Plan process and results, as intensification is generally planned for areas not adjacent to existing neighborhoods.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.65	0.45	0.20	77 units added since 2010, but another 400 are proposed and more expected as Specific Plan is completed; City overall has been averaging 300-400 new units annually over the past 15 years and PDA would need to average ~90 DU/yr from 2010-2040.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	400-unit project currently in pipeline, but more interest expected as Specific Plan is completed.	
		3	General Market Conditions	0.00	0.00	0.00	Significant developer interest in denser residential (rental) projects in competitive area; high incomes and rents in area, and access to job centers is a major advantage.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Few true vacancies and most properties producing some cashflow with low risk; still, high achievable unit values are already starting to attract projects that will displace some of the existing low-scale development. Developers are generally seeking density bonuses, so construction type does not appear to be a constraint.	

**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>D. Market and Investment Attractiveness</b> <i>(continued)</i>		5	Parcel size and configuration		0.00	0.00	0.00	Generally larger parcels than elsewhere in City (such as ECR corridor).
		6	Existence of major investment disincentives		0.10	0.05	0.00	Circulation pattern is awkward and services are limited, but improvements to both are expected through buildout of plan.
<b>E. Infrastructure Capacity, Needs, and Financing</b>		1	Existing infrastructure capacity		0.00	0.00	0.00	Roadway improvements and open space will be required as part of Specific Plan buildout.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	In addition to typical fee structure, Specific Plan includes an incentive program for developers to maximize density, requiring developer contributions to needed infrastructure. Recent 400-unit proposal uses this incentive program, indicating market acceptance of its requirements.
		3	PDA financing capacity		0.00	0.00	0.00	Given high unit values and commercial development potential, expect new development to be able to carry the financing burden for most necessary improvements.

**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	4,649				Lawrence Station Area Plan shows capacity for up to 4,649 units in Sunnyvale portion of plan area, but assumes "likely" buildout of 2,326 units.
		2	<i>Plan Bay Area</i> new housing allocation				2,760	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	1,889				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	Recent plan and EIR (to be complete in 2015) suggest major upzoning is unlikely.
		5	Estimated gross housing capacity at each period		4,649	4,649	4,649	
		6	Sum of Capacity Constraint Coefficients		0.85	0.55	0.20	
			<i>Planning and Entitlement Criteria</i>		0.00	0.05	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.85	0.50	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.00	0.00	
		7	EPS estimate of housing production given constraints		697	2,092	3,719	
		8	Percentage of PDA 2040 housing allocation accommodated		25.3%	75.8%	134.8%	
			Summary	Station Area Plan and EIR are nearly complete, and allow for significant housing development. Market is strong and parcels are largely developable, and infrastructure needs appear to be supportable. Council may elect to slow housing growth in future if employment goals are not being met, but strong commercial market suggests this may not be a major concern. <b>Achieving full housing allocation would require a modest EIR amendment in the future, which EPS assumes will occur in the amended scenario.</b>				

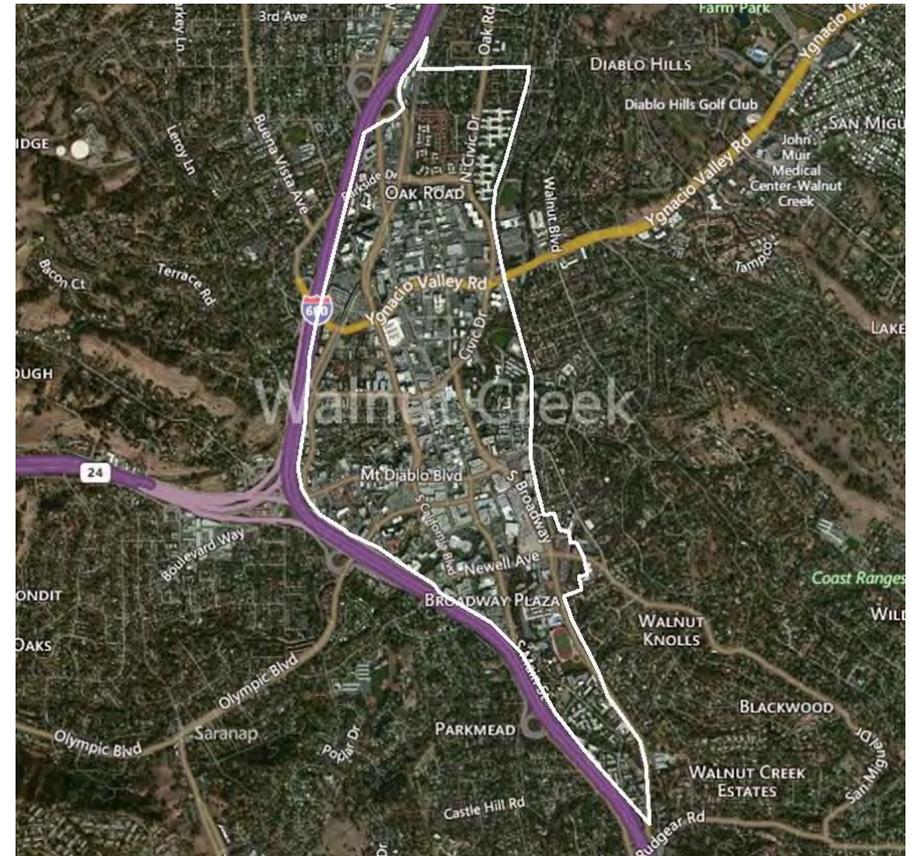
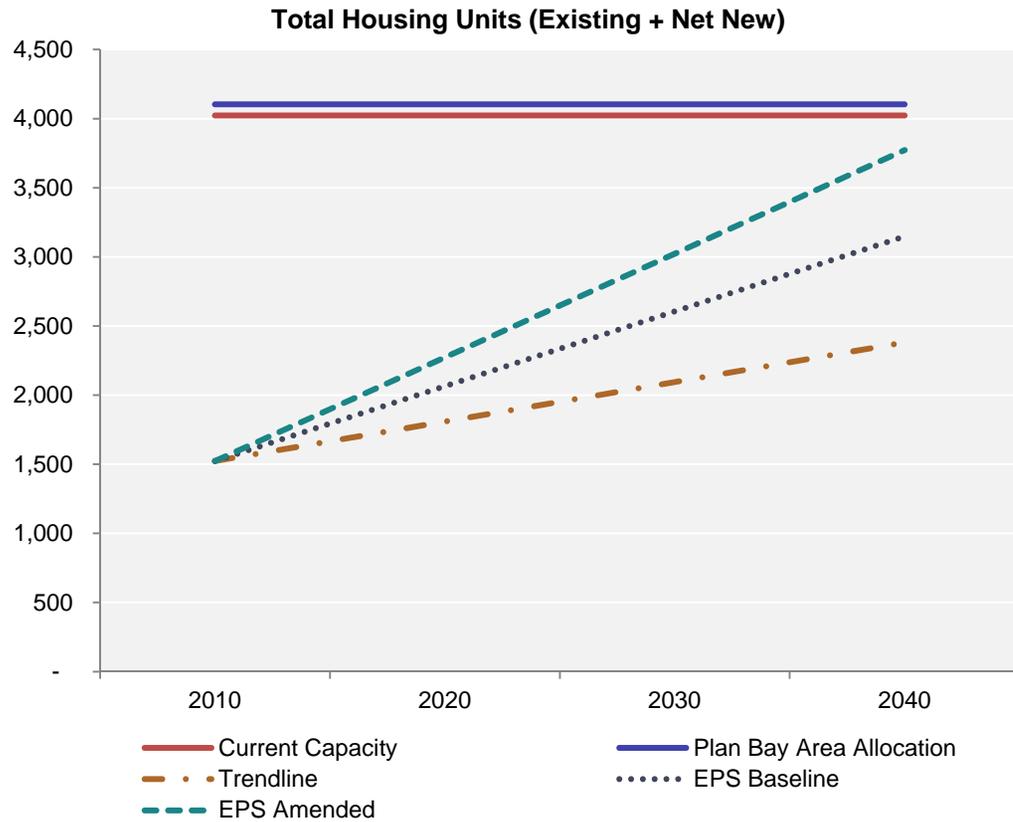
**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Displacement of existing stable residential neighborhoods	0.00	0.05	0.00	Station Area Plan and EIR scheduled for completion by the end of 2015. EIR assumes buildout at 50% of overall plan capacity; would need to amend EIR if exceeding that amount. Also, plan seeks balance of jobs and housing, and may allow Council to suspend housing development awhile if growth is unbalanced. <b>Amended scenario assume City amends EIR to allow for increased housing development.</b>	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	Plan shows future housing growth on non-residential parcels only.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Council has been supportive of rezoning this currently industrial area to allow significant housing development, and has approved several small housing projects proposed.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Community has generally supported Specific Plan process and results, as intensification is generally planned for areas not adjacent to existing neighborhoods.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.65	0.45	0.20	77 units added since 2010, but another 400 are proposed and more expected as Specific Plan is completed; City overall has been averaging 300-400 new units annually over the past 15 years and PDA would need to average ~90 DU/yr from 2010-2040.	
		2	Recent Local Development Activity (pipeline)	0.10	0.00	0.00	400-unit project currently in pipeline, but more interest expected as Specific Plan is completed.	
		3	General Market Conditions	0.00	0.00	0.00	Significant developer interest in denser residential (rental) projects in competitive area; high incomes and rents in area, and access to job centers is a major advantage.	
		4	Financial Feasibility Constraint	0.00	0.00	0.00	Few true vacancies and most properties producing some cashflow with low risk; still, high achievable unit values are already starting to attract projects that will displace some of the existing low-scale development. Developers are generally seeking density bonuses, so construction type does not appear to be a constraint.	

**Table A-62. Sunnyvale: Lawrence Station Transit Village**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>D.</b>	<b>Market and Investment Attractiveness</b> <i>(continued)</i>	5	Parcel size and configuration		0.00	0.00	0.00	Generally larger parcels than elsewhere in City (such as ECR corridor).
		6	Existence of major investment disincentives		0.10	0.05	0.00	Circulation pattern is awkward and services are limited, but improvements to both are expected through buildout of plan.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.00	0.00	Roadway improvements and open space will be required as part of Specific Plan buildout.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	In addition to typical fee structure, Specific Plan includes an incentive program for developers to maximize density, requiring developer contributions to needed infrastructure. Recent 400-unit proposal uses this incentive program, indicating market acceptance of its requirements.
		3	PDA financing capacity		0.00	0.00	0.00	Given high unit values and commercial development potential, expect new development to be able to carry the financing burden for most necessary improvements.

# Walnut Creek: West Downtown



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
2,580	2,500	1,625	63%	Infill parcelization and value of existing uses	2,250	87%	Parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-63. Walnut Creek: West Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,500				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA. Specific Plan / EIR max new net unit 2,500
		2	<i>Plan Bay Area</i> new housing allocation				2,580	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(80)				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		2,500	2,500	2,500	
		6	Sum of Capacity Constraint Coefficients		0.50	0.45	0.35	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.05	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.50	0.40	0.25	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.05	0.05	
		7	EPS estimate of housing production given constraints		1,250	1,375	1,625	
		8	Percentage of PDA 2040 housing allocation accommodated		48.4%	53.3%	63.0%	
			Summary	The West Downtown PDA is currently experiencing a substantial uptick in multifamily residential development triggered by available sites and strong sub-regional rents. The Specific Plan under preparation envisioned a revitalized mixed use neighbor to emerge in the coming years.				

**Table A-63. Walnut Creek: West Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR under preparation
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.05	There will be the need to displace some existing SF units in the SP area
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Strong Council support for recent multifamily projects that have been proposed.
		2	History of neighborhood opposition		0.00	0.00	0.00	Limited. Some potential concerns regarding the scale of multifamily development in the downtown area.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.25	0.20	0.00	Downtown Walnut Creek has emerged as one of the Bay Area's premier shopping districts and also provides a substantial concentration of office employment. Recent limits on residential construction reflect the Recession and the transition to infill development in the City.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Since 2010 some 500 multifamily units have been constructed and an additional 500 units are under discretionary review at this time
		3	General Market Conditions		0.00	0.00	0.00	Very strong market conditions exist for multifamily rental projects that will likely continue through the near and mid term.
		4	Financial Feasibility Constraint		0.20	0.10	0.10	Existing use constraint
		5	Parcel size and configuration		0.05	0.10	0.15	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.00	0.05	0.05	Roadway improvements necessary to support new development.
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.00	0.00	0.00	Specific Plan will include comprehensive financing plan.
		3	PDA financing capacity		0.00	0.00	0.00	Development in the PDA will likely generate sufficient financing capacity to fund needed infrastructure.

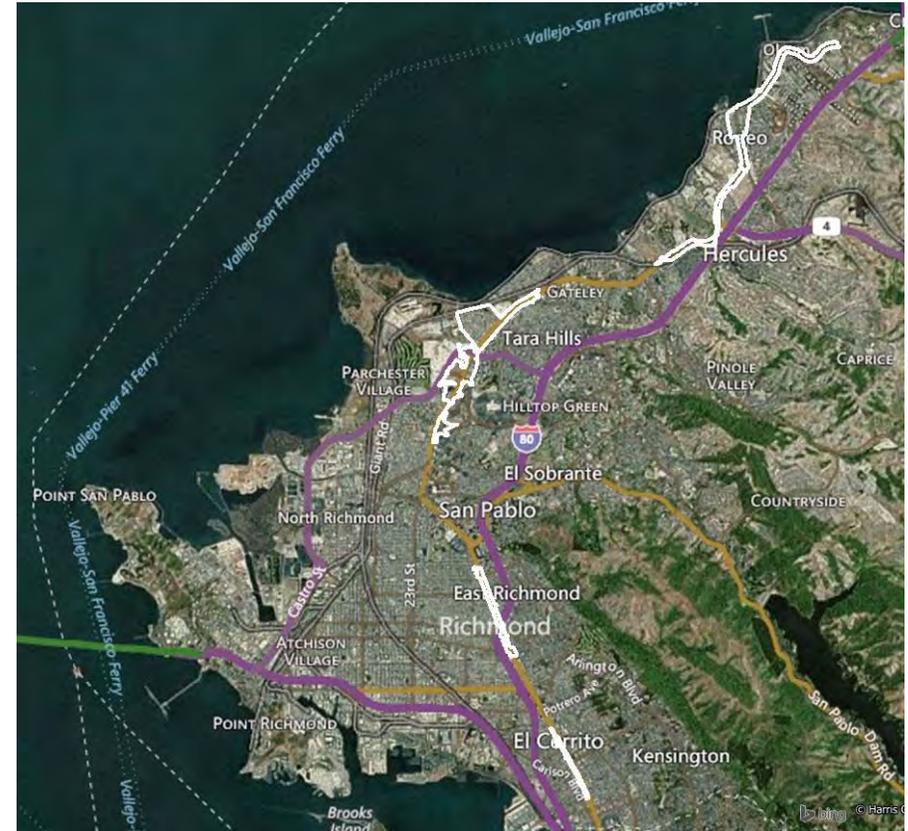
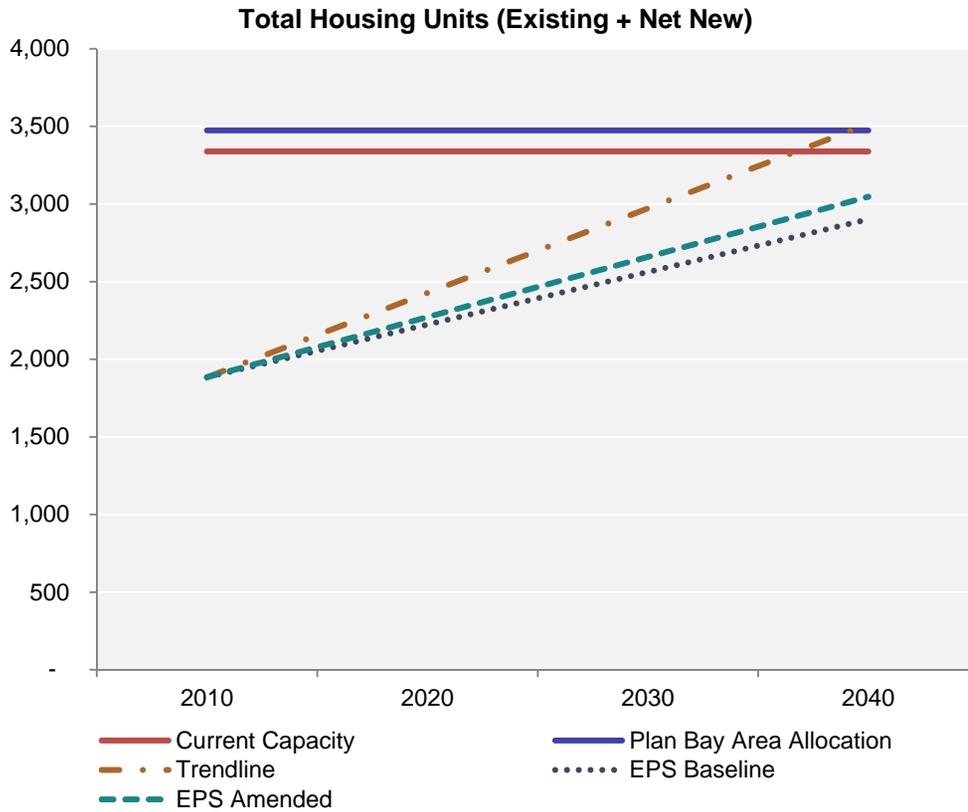
**Table A-63. Walnut Creek: West Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	2,500				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				2,580	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(80)					
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		2,500	2,500	2,500		
		6	Sum of Capacity Constraint Coefficients		0.50	0.40	0.10		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.05		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.50	0.35	0.00		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.00	0.05	0.05		
		7	EPS estimate of housing production given constraints		1,250	1,500	2,250		
		8	Percentage of PDA 2040 housing allocation accommodated		48.4%	58.1%	87.2%		
			Summary	The West Downtown PDA is currently experiencing a substantial uptick in multifamily residential development triggered by available sites and strong sub-regional rents. The Specific Plan under preparation envisioned a revitalized mixed use neighbor to emerge in the coming years.					
				<b>Public effort to assist with parcel assembly could relieve constraint.</b>					

**Table A-63. Walnut Creek: West Downtown**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR under preparation	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.05	There will be the need to displace some existing SF units in the SP area	
		3	Time required and difficulty in obtaining entitlement: institutional capacity and jurisdictional track record	0.00	0.00	0.00	City has substantial capacity to conduct planning activities and process development applications.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Strong Council support for recent multifamily projects that have been proposed.	
		2	History of neighborhood opposition	0.00	0.00	0.00	Limited. Some potential concerns regarding the scale of multifamily development in the downtown area.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.25	0.20	0.00	Downtown Walnut Creek has emerged as one of the Bay Area's premier shopping districts and also provides a substantial concentration of office employment	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Since 2010 some 500 multifamily units have been constructed and an additional 500 units are under discretionary review at this time	
		3	General Market Conditions	0.00	0.00	0.00	Very strong market conditions exist for multifamily rental projects that will likely continue through the near and mid term.	
		4	Financial Feasibility Constraint	0.20	0.10	0.00	Existing use constraint	
		5	Parcel size and configuration	0.05	0.05	0.00	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  Public effort to assist with parcel assembly could relieve constraint.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.00	0.05	0.05	Roadway improvements necessary to support new development.	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.00	0.00	0.00	Specific Plan will include comprehensive financing plan.	
		3	PDA financing capacity	0.00	0.00	0.00	Development in the PDA will likely generate sufficient financing capacity to fund needed infrastructure.	

# West Contra Costa Transportation Advisory Committee: San Pablo Avenue



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,590	1,454	1,018	64%	Market conditions and infill parcelization	1,163	73%	Parcel assembly tools available

**Table A-64. West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Baseline Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,454				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				1,590	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	(136)					Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		1,454	1,454	1,454		
		6	Sum of Capacity Constraint Coefficients		0.80	0.70	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
	<i>Market and Investment Attractiveness</i>		0.55	0.45	0.10				
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.25	0.20				
7	EPS estimate of housing production given constraints		291	436	1,018				
8	Percentage of PDA 2040 housing allocation accommodated		18.3%	27.4%	64.0%				
	Summary		Downtown area now planned for substantial expansion of residential development, well above the PDA housing allocation. Constraints include need for substantial infrastructure investments, compatibility of the variety of land uses and related conflicts (parking, etc.) and also concern on the part of existing residents regarding the impacts of the new residential development on Fremont's already overcrowded K-12 schools. City is in process of developing financing sources to tap development-based financing capacity and external sources.						

**Table A-64. West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Corridor Plan and EIR have been completed	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city	0.20	0.15	0.00	Development in Richmond as a whole was severely affected by the price reductions associated with the Recession and local conditions.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Very limited development activity along the San Pablo Corridor in recent years and in Richmond generally in the post-Recession period.	
		3	General Market Conditions	0.10	0.10	0.00	Real estate prices in Richmond continue to improve buoyed by the improving East Bay housing market and continued investment in the area.	
		4	Financial Feasibility Constraint	0.10	0.10	0.00	Site availability and assembly costs may affect financial feasibility until market rents and pricing further improve.	
		5	Parcel size and configuration	0.05	0.10	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid	
		6	Existence of major investment disincentives	0.10	0.00	0.00	Transitional area likely to improve over time	
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity	0.05	0.10	0.10	Roadway and utility improvements required	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.15	0.10	0.05	No. Richmond is considering innovated financing mechanisms to fund needed infrastructure.	
		3	PDA financing capacity	0.05	0.05	0.05	Financing capacity will be limited by slow pace of development	

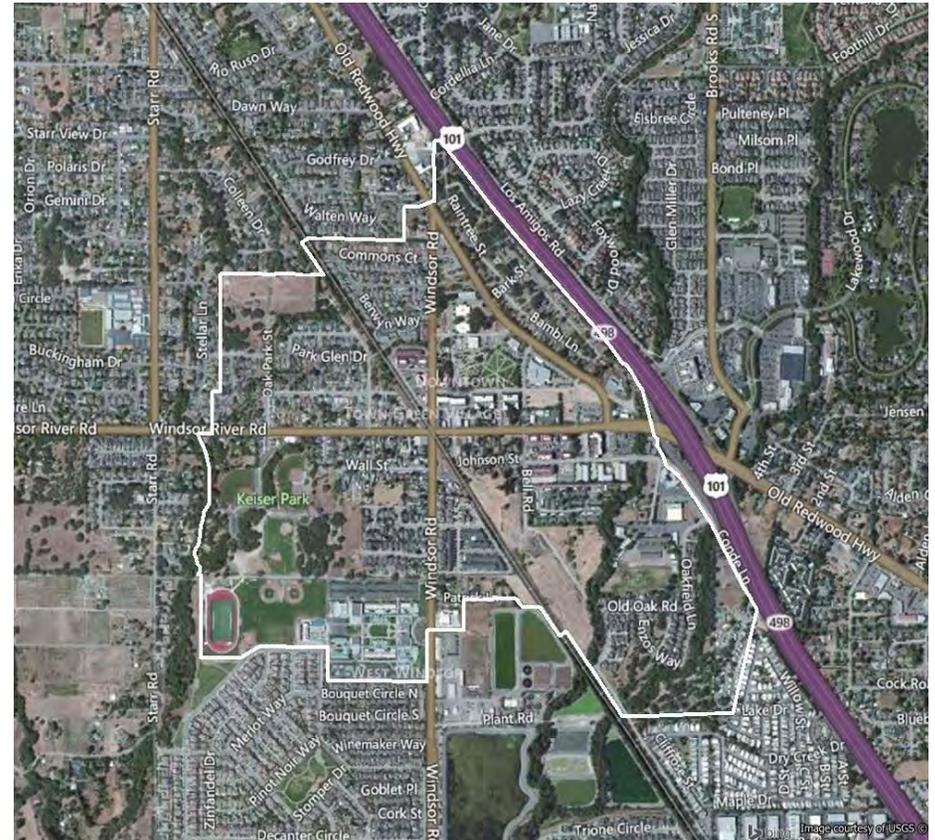
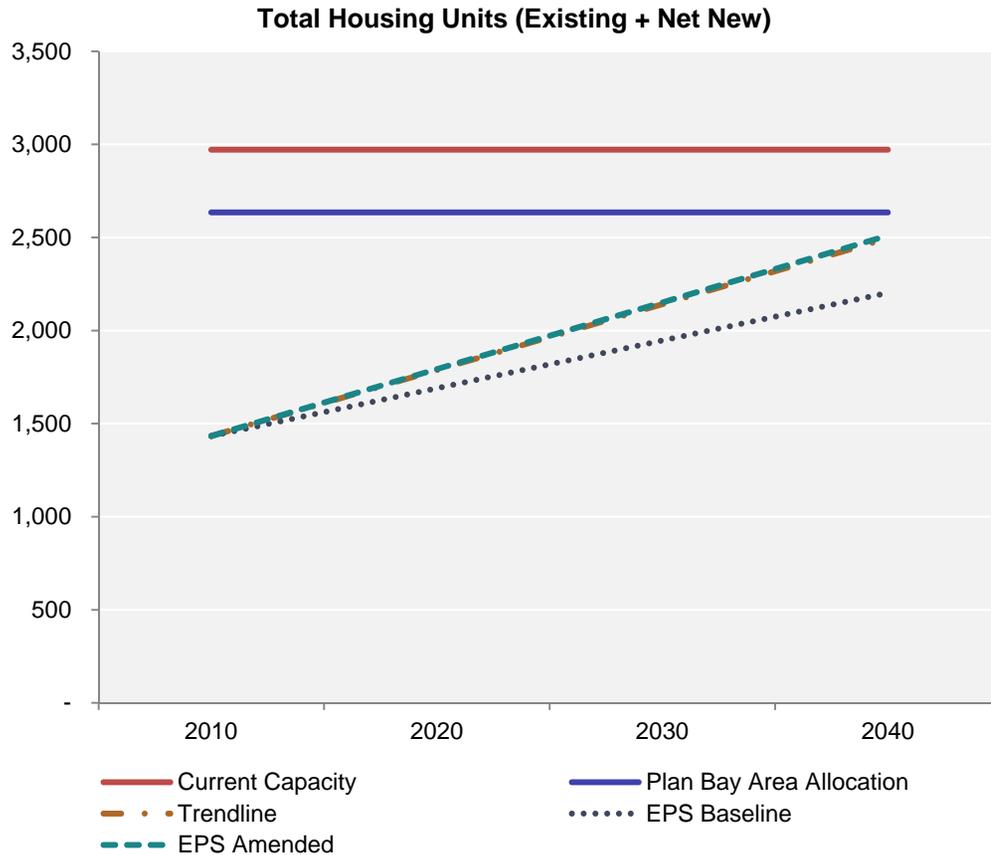
**Table A-64. West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,454				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,590	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	(136)				
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,454	1,454	1,454	
		6	Sum of Capacity Constraint Coefficients		0.80	0.60	0.20	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
	<i>Market and Investment Attractiveness</i>		0.55	0.40	0.05			
	<i>Infrastructure Capacity, Needs, and Financing</i>		0.25	0.20	0.15			
7	EPS estimate of housing production given constraints			291	582	1,163		
8	Percentage of PDA 2040 housing allocation accommodated			18.3%	36.6%	73.2%		
	Summary		This linear PDA along San Pablo Avenue has potential infill sites. Market factors will limit development potential in the area along with the need for infrastructure improvements.					
			<b>Improved efforts at parcel assembly.</b>					

**Table A-64. West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Corridor Plan and EIR have been completed
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.20	0.15	0.00	Development in Richmond as a whole was severely affected by the price reductions associated with the Recession and local conditions.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Very limited development activity along the San Pablo Corridor in recent years and in Richmond generally in the post-Recession period.
		3	General Market Conditions		0.10	0.10	0.00	Real estate prices in Richmond continue to improve buoyed by the improving East Bay housing market and continued investment in the area.
		4	Financial Feasibility Constraint		0.10	0.10	0.00	Site availability and assembly costs may affect financial feasibility until market rents and pricing further improve.
		5	Parcel size and configuration		0.05	0.05	0.05	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  <b>Improved efforts at parcel assembly.</b>
		6	Existence of major investment disincentives		0.10	0.00	0.00	Transitional area likely to improve over time
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.05	0.10	0.10	Roadway and utility improvements required
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.15	0.05	0.00	No. Richmond is considering innovated financing mechanisms to fund needed infrastructure.
		3	PDA financing capacity		0.05	0.05	0.05	Financing capacity will be limited by slow pace of development

# Windsor: Redevelopment Area



## Net New Units - Allocation, Capacity, and Projection

Plan Bay Area Allocated Growth (Units)	Current Capacity for Housing Growth (Units)	Baseline "Readiness" Projected New Units (2010-2040)		Baseline Key Constraints	Amended "Readiness" Projected New Units (2010-2040)		Amendment Assumptions
		Number	% of Total Allocation		Number	% of Total Allocation	
1,200	1,538	769	64%	Market conditions and infrastructure needs	1,076	90%	Improved infrastructure funding (EIFD) and parcel assembly tools available

Sources: AGS 2013; Plan Bay Area; Economic and Planning Systems, Inc.

**Table A-65. Windsor: Redevelopment Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,538				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.
		2	<i>Plan Bay Area</i> new housing allocation				1,200	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.
		3	Capacity surplus or (shortfall)	338				Difference between estimated housing capacity (2015) and allocation
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%	
		5	Estimated gross housing capacity at each period		1,538	1,538	1,538	
		6	Sum of Capacity Constraint Coefficients		0.90	0.80	0.50	
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00	
			<i>Community Support</i>		0.00	0.00	0.00	
			<i>Market and Investment Attractiveness</i>		0.60	0.50	0.20	
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.30	0.30	
		7	EPS estimate of housing production given constraints		154	308	769	
		8	Percentage of PDA 2040 housing allocation accommodated		12.8%	25.6%	64.1%	
			Summary	The Downtown Windsor PDA is located along the SMART transit line and has been transformed in recent years through substantial development of multifamily housing and commercial development centered around a town green. Limited opportunity sites and infrastructure costs will limit development potential in the near and mid-term.				

**Table A-65. Windsor: Redevelopment Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Baseline Version</b>								
<b>B.</b>	<b>Planning and Entitlement Criteria</b>	1	Is there a Specific Plan or EIR in place?		0.00	0.00	0.00	Specific Plan and EIR completed.
		2	Displacement of existing stable residential neighborhoods		0.00	0.00	0.00	No.
<b>C.</b>	<b>Community Support</b>	1	Elected official support for proposed PDA use types and densities during past 3 years		0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.
		2	History of neighborhood opposition		0.00	0.00	0.00	No.
<b>D.</b>	<b>Market and Investment Attractiveness</b>	1	History of real estate investment in PDA and surrounding city		0.30	0.25	0.00	The Downtown Windsor PDA has been the site of substantial mixed use development beginning in the late 1990's. Recession slowed development but interest is increasing.
		2	Recent Local Development Activity (pipeline)		0.00	0.00	0.00	Two development projects in the PDA (Bell Meadows and Windsor Mill) comprise nearly 800 new units.
		3	General Market Conditions		0.10	0.10	0.00	Recent development activity throughout Windsor has been limited by Recession and the overall slow real estate recovery in Sonoma County; new projects indicate a strengthening of Windsor's market.
		4	Financial Feasibility Constraint		0.20	0.10	0.10	Costs of land assembly and infrastructure may limit development that could otherwise occur.
		5	Parcel size and configuration		0.00	0.05	0.10	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid
		6	Existence of major investment disincentives		0.00	0.00	0.00	None.
<b>E.</b>	<b>Infrastructure Capacity, Needs, and Financing</b>	1	Existing infrastructure capacity		0.20	0.20	0.20	Roads and wet utilities require improvement to support new development
		2	Is there an existing CIP funded or other infrastructure financing plan in place?		0.10	0.05	0.00	Specific Plan included financing plan and City is pursuing innovative financing techniques including an EIFD to offset costs otherwise borne by development.
		3	PDA financing capacity		0.00	0.05	0.10	Limited financing capacity in comparison to costs will require additional external sources and methods.

**Table A-65. Windsor: Redevelopment Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes	
					2020	2030	2040		
<b>Amended Version</b>									
A.	<b>PDA Housing Capacity Estimate</b>	1	Estimate of current local land use policy new housing capacity	1,538				Capacity based on review of existing zoning and planning documents and visual inspection of the PDA.	
		2	<i>Plan Bay Area</i> new housing allocation				1,200	This number refers to the increment of new housing allocated to the PDA in Plan Bay Area.	
		3	Capacity surplus or (shortfall)	338				Difference between estimated housing capacity (2015) and allocation	
		4	Estimated increased capacity through likely changes to land use policy, including any initiative-based density restrictions (percentage change to existing capacity)		0%	0%	0%		
		5	Estimated gross housing capacity at each period		1,538	1,538	1,538		
		6	Sum of Capacity Constraint Coefficients		0.90	0.65	0.30		
			<i>Planning and Entitlement Criteria</i>		0.00	0.00	0.00		
			<i>Community Support</i>		0.00	0.00	0.00		
			<i>Market and Investment Attractiveness</i>		0.60	0.35	0.05		
			<i>Infrastructure Capacity, Needs, and Financing</i>		0.30	0.30	0.25		
		7	EPS estimate of housing production given constraints		154	538	1,076		
		8	Percentage of PDA 2040 housing allocation accommodated		12.8%	44.8%	89.7%		
			Summary	<p>The Downtown Windsor PDA is located along the SMART transit line and has been transformed in recent years through substantial development of multifamily housing and commercial development centered around a town green. Limited opportunity sites and infrastructure costs will limit development potential in the near and mid-term.</p> <p>City assistance with infrastructure financing improves feasibility. City assists with parcel assembly and disposition of existing public lands. Infrastructure capacity improved using development-based and City sources (EIFD).</p>					

**Table A-65. Windsor: Redevelopment Area**

Item	Readiness Criteria Category	#	Sub-Criterion Name	Present (2015)	PDA Development Readiness Scoring			Notes
					2020	2030	2040	
<b>Amended Version</b>								
B.	Planning and Entitlement Criteria	1	Is there a Specific Plan or EIR in place?	0.00	0.00	0.00	Specific Plan and EIR completed.	
		2	Displacement of existing stable residential neighborhoods	0.00	0.00	0.00	No.	
		3	Time required and difficulty in obtaining entitlement: institutional capacity and jurisdictional track record	0.00	0.00	0.00	City has capacity and has demonstrated ability to efficiently process development applications.	
C.	Community Support	1	Elected official support for proposed PDA use types and densities during past 3 years	0.00	0.00	0.00	Support indicated by adoption of the specific plan and related efforts to promote development in the area over the years resulting in the existing form of Marina Bay.	
		2	History of neighborhood opposition	0.00	0.00	0.00	No.	
D.	Market and Investment Attractiveness	1	History of real estate investment in PDA and surrounding city	0.30	0.15	0.00	The Downtown Windsor PDA has been the site of substantial mixed use development beginning in the late 1990's. Recession slowed development but interest is increasing.	
		2	Recent Local Development Activity (pipeline)	0.00	0.00	0.00	Two development projects in the PDA (Bell Meadows and Windsor Mill) comprise nearly 800 new units.	
		3	General Market Conditions	0.10	0.10	0.00	Recent development activity highly limited by Recession and slow recovery in Sonoma County.	
		4	Financial Feasibility Constraint	0.20	0.10	0.05	Costs of land assembly and infrastructure may limit development that could otherwise occur.  City assistance with infrastructure financing improves feasibility.	
		5	Parcel size and configuration	0.00	0.00	0.00	As housing development continues, it is assumed that optimal parcels will be targeted first, leaving, in the later years of the study period, vacant sites that include those with Irregular shape, grades, and with poor connection to the street grid.  City assists with parcel assembly and disposition of existing public lands.	
		6	Existence of major investment disincentives	0.00	0.00	0.00	None.	
E.	Infrastructure Capacity, Needs, and Financing	1	Existing infrastructure capacity	0.20	0.20	0.10	Roads and wet utilities require improvement to support new development.  Infrastructure capacity improved using development-based and City sources (EIFD)	
		2	Is there an existing CIP funded or other infrastructure financing plan in place?	0.10	0.05	0.05	Specific Plan included financing plan and City is pursuing innovative financing techniques including an EIFD to offset costs otherwise borne by development.	
		3	PDA financing capacity	0.00	0.05	0.10	Limited financing capacity in comparison to costs will require additional external sources and methods.	