DRAFT

# A SMART-GROWTH CHECKLIST
## FOR TESTING DEVELOPMENT PROJECTS AGAINST BAY AREA LIVABILITY OBJECTIVES

The San Francisco Bay Area contains nine counties and over one hundred cities. These local governments are responsible for formulating local land-use plans and for regulating land development consistent with those plans.

There are also a number of region-wide agencies in Bay Area. Two of these, the Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) have joined together in a Joint Policy Committee (JPC) to work toward the achievement of a collective vision for the entire Bay Area. That vision was developed through the Smart Growth Strategy/Regional Livability Footprint Project. The Project was done under the auspices of a multi-sector partnership—including representatives of government, private business and the voluntary sector—and involved the participation of thousands of citizens from throughout the region. The JPC intends to pursue the vision through influencing the strategic investment of regional funds, principally in transportation improvements, and through the voluntary cooperation of a number of partners, particularly local governments.

The core principle of the regional vision is smart growth. Smart growth is regional development that revitalizes central cities and older suburbs, supports and enhances public transit, promotes walking and bicycling, and preserves open spaces and agricultural lands. Smart growth seeks to revitalize the already-built environment and to ensure that new development occurs in the most efficient manner possible. It aims to create more livable communities with sufficient housing for the region's workforce. Smart growth attempts to minimize the impact of development on the environment and on natural resources, it tries to reduce the need for new and redundant public expenditures, and it works to ensure that all the region's residents—including those who are disadvantaged—benefit from the changes associated with growth.

This checklist is to assist local governments in their contribution to achieving the Bay Area vision, promoting smart growth and building a more livable region. Without imposing prescriptive, inflexible and precise standards and without requiring an expensive and time-consuming analysis process, it provides a set of general qualities against which to test individual development proposals.

By going through the list, local governments may make a rudimentary assessment of how an individual project facilitates or frustrates the future which the entire Bay Area is pursuing. To the extent that there is discretion, this assessment may influence the development approvals process and help identify desirable project improvements. In the longer term, it may prompt amendments to general plans and zoning codes to encourage more regionally friendly projects. At minimum, it should provoke a productive

discussion of the project and of the community's future in the context of the entire Bay Area.

## Regional Policy

The checklist is based on explicit regional policy. Both the ABAG and MTC Boards have formally adopted the Preamble and Policies quoted in the box below. These have also been adopted by the Bay Conservation and Development Commission (BCDC) and by the Bay Area Air Quality Management District (BAAQMD).

## Preamble

Current land-use patterns in the San Francisco Bay Area are putting intense pressure on the economic, environmental and social wellbeing of the Bay Area and of surrounding regions. The projected addition of over one million new residents and one million new jobs in the coming decades will further challenge our ability to sustain the high quality of life we enjoy today.

To help meet this challenge, the five regional agencies of the Bay Region—the Association of Bay Area Governments, Bay Area Air Quality Management District, Bay Conservation and Development Commission, Metropolitan Transportation Commission and the Regional Water Quality Control Board—along with the economy, environment and social equity caucuses of the Bay Area Alliance for Sustainable Communities, developed a set of Smart Growth policies.

The policies reflect the values articulated by workshop participants of the Smart Growth Strategy/Regional Livability Footprint Project and address Bay Area conditions. The policies are consistent with widely accepted notions of smart growth. They are meant to encourage meaningful participation from local governments, stakeholders and residents.

The policies provide a framework for decision-making on development patterns, housing, transportation, environment, infrastructure, governmental fiscal health and social equity that can lead us toward development of vibrant neighborhoods, preservation of open space, clean air and water, and enhanced mobility choices, while enhancing the Bay Area's relationship with surrounding regions.

## Policies

**Jobs/Housing Balance and Match**
Improve the jobs/housing linkages through the development of housing in proximity to jobs, and both in proximity to public transportation. Increase the supply of affordable housing and support efforts to match job income and housing affordability levels.

**Housing and Displacement**
Improve existing housing and develop sufficient new housing to provide for the housing needs of the Bay Area community. Support efforts to improve housing affordability and limit the displacement of existing residents and businesses.

***preamble and policies continued…***

**Social Justice and Equity**
Improve conditions in disadvantaged neighborhoods, ensure environmental justice, and increase access to jobs, housing, and public services for all residents in the region.

**Environmental, Natural Resource, Open Space and Agricultural Preservation**
Protect and enhance open space, agricultural lands, other valued lands, watersheds and ecosystems throughout the region. Promote development patterns that protect and improve air quality. Protect and enhance the San Francisco Bay and Estuary.

**Mobility, Livability and Transit Support**
Enhance community livability by promoting in-fill, transit oriented and walkable communities, and compact development as appropriate. Develop multi-family housing, mixed-use development, and alternative transportation to improve opportunities for all members of the community.

**Local and Regional Transportation Efficiencies**
Promote opportunities for transit use and alternative modes of transportation including improved rail, bus, high occupancy (HOV) systems, and ferry services as well as enhanced walking and biking. Increase connectivity between and strengthen alternative modes of transportation, including improved rail, bus, ride share and ferry services as well as walking and biking. Promote investments that adequately maintain the existing transportation system and improve the efficiency of transportation infrastructure.

**Infrastructure Investments**
Improve and maintain existing infrastructure and support future investments that promote smart growth, including water and land recycling, brownfield clean-up and re-use, multi-use and school facilities, smart building codes, retention of historic character and resources, and educational improvements.

**Local Government Fiscal Health**
Improve the fiscal health of local government by promoting stable and secure revenue sources, reduced service provision costs through smart growth targeted infrastructure improvement, and state and regional sponsored fiscal incentives. Support cooperative efforts among local jurisdictions to address housing and commercial development, infrastructure costs, and provision of services.

**Cooperation on Smart Growth Policies**
Encourage local governments, stakeholders and other constituents in the Bay Area to cooperate in supporting actions consistent with the adopted Smart Growth policies. Forge cooperative relationships with governments and stakeholders in surrounding regions to support actions that will lead to inter-regional Smart Growth benefits

## The Role of Development Projects

Smart growth is a simple concept but difficult to achieve. The attainment and maintenance of the qualities we all want for the Bay Area will require the concerted and coordinated effort of all levels of government and the cooperation of myriad participants in the private and voluntary sectors. Smart growth will not occur by just changing the characteristics of individual development projects. It will require hard choices about where we put our transportation and infrastructure dollars, how we designate and protect open space and other environmental assets, and what collective steps we take to ensure that all segments of the region's population, particularly our most vulnerable, benefit from growth.

Nevertheless, the character of the new development has a central role to play in maintaining the livability of the Bay Area. The location, composition, density and design of new development projects can have an immense cumulative impact on the Bay Area's ability to sustain a healthy economy and reasonable cost of living, to provide effective and inexpensive public services, to secure adequate choice and opportunity for present and future generations of residents, to protect our environment, and to ensure that we all continue to enjoy a high quality of life.

New development is supportive of the smart growth policies and helps pursue the region's livability objectives to the extent that it:

1. Reduces the need to travel long distances;
2. Facilitates transit and other non-automotive travel;
3. Increases the availability of affordable housing;
4. Uses land efficiently;
5. Helps protect natural assets;
6. Promotes social equity;
7. Employs existing infrastructure capacity;
8. Maintains and reinforces existing communities.

## The Checklist

The following checklist, organized around the above eight criteria, provides a ready, non-technical way of assessing a development project's contribution to smart growth and Bay Area livability objectives. In total, the checklist describes an *ideal*. It is highly unlikely that any one project will earn a check mark in every box—or even in most. Many of the items are not applicable to every project. However, going through the list will facilitate an informal evaluation of a project's performance relative to the shared vision for the

region and help identify areas where improvement is desirable and possible. The checklist is not a substitute for the detailed technical analysis that may be required to measure a project's environmental impact or to assess conformity with community land-use objectives; but the list may supplement that technical analysis and help focus it on issues that are also of concern to the overall health of the entire Bay Area region.

**1. Reduces the need to travel long distances**

- ☐ If a residential or mixed-use project, it creates housing units appropriate to and affordable for people working in the local community (i.e., it could decrease the requirement to import workers from outside the community).
- ☐ If a commercial, industrial or mixed-use project, it provides jobs which could be filled by people living in the local community (i.e., the jobs generally match the skill levels of the local labor force).
- ☐ If a residential or mixed-use project, it is within walking distance of or contains the stores and services that people typically require on an everyday basis (e.g., food or convenience store, dry cleaner, neighborhood school, childcare facility, recreation center).
- ☐ If a commercial, industrial or mixed-use project providing significant employment, it is within walking distance of or contains services and activities that fulfill everyday needs and provide respite from the work environment (e.g., restaurants, parks, recreation facilities, convenience retail).
- ☐ It provides housing opportunities within walking distance of an employment center or employment opportunities within walking distance of a substantial residential population.
- ☐ It mixes uses (any combination of housing, retail, office and services) or it adds to the diversity of uses within an existing area.

**2. Facilitates transit and other non-automotive travel**

- ☐ It locates housing units or employment locations within walking distance of a rail transit station, bus stop, ferry terminal or other transit boarding point.
- ☐ It encourages easy, direct and safe pedestrian travel (i.e., it contains or connects directly to developed sidewalks or pedestrian paths, and it provides for the safe and convenient pedestrian crossing of thoroughfares, automobile entrances, and driveways.
- ☐ It makes provision for bicycle commuting (e.g., bike paths or lanes, bike racks and lockers, showers and changing rooms in commercial and industrial facilities).

☐ It is developed at densities appropriate to the existing or anticipated transit technology serving the project (These will vary by corridor and other specific situations, but generally accepted rules of thumb are: conventional bus at 7 to 15 residential units per acre, commuter rail or light rail at 10 to 25 units per acre—higher at stations, rapid transit such as BART at 25 to 75 residential units per acre or with commercial floor area ratios up to 10 in suburban centers and higher in downtowns).

☐ It provides pedestrian amenities that encourage walking (e.g., weather protection, sidewalk trees, lighting, trash receptacles and street furniture) and assist transit use (e.g., bus benches and shelters, informative signing).

**3. Increases the availability of affordable housing**

☐ It enlarges the variety of housing types (single family, townhomes, and apartments), sizes (studio, 1BR, 2BR, 3BR, etc), tenures (fee simple, condominium and rental) and prices available, contributing to a more complete, inclusive and multi-generational community.

☐ It provides housing units affordable to households earning between 80 and 120 percent of the regional median household income or less.

☐ It contributes to meeting the community's statutory allocation of regional housing need, particularly for the very low, low and moderate income categories.

**4. Uses land efficiently**

☐ It is developed at a density higher than but compatible with that prevailing in the surrounding community (i.e., it increases the housing or employment yield per unit of land but does not overwhelm infrastructure capacity or neighborhood character).

☐ It results in the infill and completion of an existing community rather than an expansion of the developed area or the creation of new separated and isolated areas of development.

☐ It creates integrated public open space which is not only decorative but also accessible and usable, providing a shared community amenity and an alternative to private space.

**5. Helps protect natural assets**

☐ It is developed within a developed area without encroachment into greenbelt, particularly into environmental assets (e.g., watersheds, shorelines and wetlands, unbroken forest and grassland areas, wildlife habitat) or into agricultural land.

☐ It results in the clean up of a contaminated site (i.e., brownfield).

- ☐ It is designed to be energy efficient (e.g., it is well-insulated, it uses low-energy lighting and appliances and natural lighting and ventilation when feasible; it employs environmentally friendly energy sources such as solar, geo-thermal or co-generation.

- ☐ It uses recycled or low-impact building materials.

- ☐ It is sited so as to protect existing mature trees.

- ☐ It helps conserve water (e.g., it uses less water-demanding landscape materials or it uses recycled "gray" water for irrigation).

- ☐ It demonstrates good contemporary practices for storm-water management, pollution prevention, and minimization of storm-water runoff.

- ☐ It is located on land that is physically suitable for development (e.g., not on steep slopes greater than 15 percent, directly above seismic fault lines and areas subject to extreme liquefaction, or areas subject to frequent flooding).

**6. Promotes social equity**

- ☐ It minimizes displacement of existing lower-income residents or existing small, independent businesses and it provides affordable and suitable replacement units for those displaced.

- ☐ It provides employment opportunities suitable for and accessible to an existing population of unemployed or underemployed workers.

- ☐ It provides affordable space for needed community services (e.g., child care and child development, public recreation and education, health care).

- ☐ It preserves and improves or it adds low-income housing which blends seamlessly into the surrounding community and does not concentrate, isolate or stigmatize residents.

**7. Employs existing infrastructure capacity**

- ☐ It is located adjacent to existing infrastructure: roads, public transit, water, sewer and schools.

- ☐ It attempts to use existing facilities in preference to new or additional facilities (e.g., fire, police, schools).
- ☐ It uses and helps maintain public facilities that would otherwise face downsizing or closure (e.g., schools left behind by demographic change).

**8. Maintains and reinforces existing communities**

- ☐ It helps complete an existing neighborhood by filling in a vacant or underutilized site or by adding missing neighborhood uses.
- ☐ It reuses or rehabilitates existing and historic structures.
- ☐ It employs an architectural style compatible with the dominant and desired character of the area.
- ☐ It relates to the surrounding community and does not create an isolated enclave.