



## Board Report

File #: 2020-0110, File Type: Plan

Agenda Number: 15.

**REVISED**  
**PLANNING AND PROGRAMMING COMMITTEE**  
**OCTOBER 14, 2020**

**SUBJECT: TRANSIT ORIENTED COMMUNITIES IMPLEMENTATION PLAN**

**ACTION: APPROVE RECOMMENDATIONS**

**RECOMMENDATION**

CONSIDER:

1. APPROVING the Transit Oriented Communities (TOC) Implementation Plan (Attachment A) and the TOC Grant Writing and Technical Assistance Program Guidelines (Attachment B); and
2. AUTHORIZING the Chief Executive Officer or designee to enter into multiple agreements with Los Angeles County cities, the County of Los Angeles, and other eligible entities to fund TOC Grant Writing and Technical Assistance recommended in the TOC Implementation Plan in an aggregate amount not to exceed \$5,000,000, subject to annual budget programming.

**ISSUE**

In 2018, the Metro Board adopted the Transit Oriented Communities Policy (TOC Policy) which affirmed Metro's commitment to incorporate equity, community development, and land use in how Metro plans and delivers the Los Angeles County public transportation system. The TOC Policy committed Metro to the development of an Implementation Plan as an immediate next step to establish how Metro will work with partners across Los Angeles County to realize equitable TOCs.

The COVID-19 economic and public health pandemic has further exacerbated the pressing need for community stabilization, equity, and access to opportunity in Los Angeles County, especially in communities of color. The implications of this crisis directly affect the Metro riders of today and tomorrow.

The TOC Implementation Plan (TOC Plan) (Attachment A) charts an actionable course for Metro to lead and to partner with communities across the county to leverage the positive benefits that come with the public transportation system, as well as chart a course to guard against potential unintended consequences especially within vulnerable communities.

**BACKGROUND**

The Vision 2028 Strategic Plan calls for Metro to ***enhance communities and lives through mobility and access to opportunity*** and to ***transform LA County through regional collaboration and national leadership***. The TOC Plan seeks to leverage the investment in the public transportation system to spur access to opportunity and improve equitable outcomes in Los Angeles County. Metro recognizes that collaboration and partnerships are essential to realizing equitable TOCs. The TOC Plan is an example of Metro stepping into a regional leadership role through actions that maximize equitable, positive outcomes for Los Angeles County residents and create places that support transit riders and increase transit ridership.

The public transportation system expansion is a once-in-a-generation opportunity that extends to almost every corner of Los Angeles County and will touch almost every county resident. Metro is in a unique position to convene, lead, influence and support jurisdictions and communities to identify community-specific strategies for transit-supportive community development plans and policies that are essential for a successful transportation system.

The TOC Plan will support transit-adjacent communities to leverage the transit infrastructure and promote multi-modal connectivity to and from transit. It will also help foster land use and development patterns that leverage the transit investment and make it easy and convenient for people to live, work, and shop in communities connected by transit.

The TOC Plan builds upon the goals of the TOC Policy adopted by the Board in 2018 which include:

1. Increase transit ridership and choice.
2. Stabilize and enhance communities surrounding transit.
3. Engage organizations, jurisdictions, and the public.
4. Distribute transit benefits to all.
5. Capture the value created by transit.

In addition, the TOC Plan will advance other aspects of the TOC Policy which include identification of opportunities where Metro leads and partners, as well as defining eligible TOC activities for which jurisdictions can use Measure M local return.

The TOC Plan was developed in close coordination with the TOC Policy Working Group which includes representatives of the Metro Policy Advisory Council (PAC), Los Angeles County jurisdictions, the Southern California Association of Governments (SCAG), Councils of Government (COGs), and advocacy organizations. A total of six meetings were held with the Working Group over the course of the preparation of the TOC Plan.

## **DISCUSSION**

The TOC Plan includes a series of initiatives, strategies, and actions for Metro to undertake directly or as a partner to maximize the public transit investments that support equitable community development and thus increase transit ridership. The TOC Plan is organized into the following four initiatives:

1. **Creating TOC Corridor Baseline Assessments for all Metro Transit Corridors:** Highlight community characteristics, opportunities, and needs to support communities in leveraging the positive benefits of the transit investment and guarding against potential unintended consequences.

2. **Continually Improving Metro TOC Programmatic Areas:** A series of actions that Metro will undertake to ensure that Metro TOC Programs align with and advance the TOC Policy goals and outcomes.
3. **Enhancing Metro's Internal Coordination:** Activities that Metro will undertake to align internal coordination in support of creating TOCs in Los Angeles County.
4. **Strengthening Coordination and Collaboration with Metro's Partners:** Many of the activities that are critical to TOCs are outside of Metro's jurisdiction. This initiative calls for ongoing coordination and collaboration with municipalities, local communities, and advocacy organizations which is essential for the region to realize equitable TOCs.

The TOC Plan incorporates many existing Metro TOC programs and highlights strategic new programs to build LA County jurisdictions' capacity in TOC areas. The TOC Initiative areas include *actions* (the activity that Metro will undertake), *measures* (a measurable activity that Metro will achieve, track, and report on semi-annually), *timeline* (the target period to launch an action), and identification of whether *Metro leads or supports*.

The following three new programs are the most notable and impactful for supporting TOCs in Los Angeles County. Staff recommends implementing these in the near-term.

#### TOC Corridor Baseline Assessments

The TOC Corridor Baselines (Baselines) are one of the most critical and potentially impactful recommendations in the TOC Plan. Baselines will be developed for every Metro Transit Corridor, starting with Measure M, in close partnership with jurisdictions and with deep stakeholder engagement throughout the process. Each Baseline will be informed by a three-part process that includes data assessment, policy inventory and assessment, and recommended strategies for realizing equitable TOCs.

The data assessment will explore community characteristics around the TOC Policy goals and sub-goals and will include socioeconomic, demographic, housing, mobility, and other TOC-related data sets, with a keen focus on identifying community-specific equity needs. Informed by this data, the policy assessments will inventory and analyze jurisdictions' existing TOC-related policies and programs around station areas to determine whether policies are in place and whether there is a need to update a policy/program or develop a new one based on findings from the Baselines. Each Baseline will include a series of recommended strategies for each jurisdiction to pursue to realize equitable TOCs.

Stakeholder engagement will be incorporated in every step of the process. For example, stakeholders will be engaged during the data assessment to ensure that the data is accurately reflective of community characteristics as well as during the policy/program assessment to confirm that the policy/program recommendations that come out of the Baseline process are reflective of community needs. As such, staff recommends partnering with academic institutions on data collection and community-based organizations (CBOs) to lead Baseline stakeholder engagement

efforts.

To start, Baselines will be prepared for every Measure M Transit Corridor and will be sequenced based on the following three considerations:

- Status of Board-approved Locally Preferred Alternative (LPA)
- Transit Corridor line open date
- Equity Focus Communities (EFCs)

Baselines will also be prepared for existing transit corridors upon completion of the Measure M Transit Corridor Baselines. Staff anticipates preparing a Baseline for the first Transit Corridor in FY21 and sequencing Baselines for other transit corridor on an annual basis, staffing and funding permitting. To track need and progress over time, corridor-wide Baselines will be updated in 5 to 7 10 years.

### TOC Grant Writing and Technical Assistance

TOC Grant Writing and TOC Technical Assistance will be made available to Los Angeles County jurisdictions. The TOC Grant Writing Assistance Program will make grant writers available to Los Angeles County jurisdictions seeking to apply for planning or capital grants to implement TOC activities, as defined by the TOC Policy, with a prioritization for EFCs and other high-need communities, based on socio-economic factors, as deemed relevant.

Authorization is being sought to allow Metro to enter into agreements with local jurisdictions in an aggregate amount not to exceed \$5,000,000, subject to annual budget programming. For the Metro Active Transport (MAT) component, eligible applicants also include state and federal agencies; transit agencies; and other transportation-related joint powers authorities (JPAs) that are sponsored by one of the aforementioned public agencies for the MAT component. For Transit to Parks Strategic Plan, eligible applicants for grant writing assistance also include nonprofit organizations that are eligible if they are an eligible applicant for the grant for which they are seeking grant writing assistance.

The TOC Technical Assistance Program (TOC TAP) is intended to provide jurisdictions with up to \$200,000 for technical assistance needed to build local jurisdiction capacity in TOC subject areas and/or explore the feasibility of implementing TOC planning programs through market studies, transportation and/or land use studies (including affordable housing and community stabilization), environmental remediation studies, and similar.

In addition, the TOC TAP will include convenings with Los Angeles County municipalities (staff, elected officials, and commissioners) and partners as a forum for Los Angeles County municipalities to facilitate an exchange of ideas and lessons learned, provide joint training opportunities in a time- and cost-effective manner, and structure and deliver targeted TOC technical assistance.

### Near-Term Implementation

Staff recommends proceeding with the Baselines in the near-term and focusing TOC Grant Writing and Technical Assistance planning activities on the following four categories:

1. Affordable Housing Production, Preservation, and Tenant Protections
2. Community Stabilization (including anti-displacement strategies-housing and small businesses assistance)
3. Regional Housing Needs Assessment (RHNA) compliance activities, aligned with TOC Policy Goals
4. First/Last Mile, Metro Active Transport (MAT) project implementation (for MAT, scope items that extend beyond MAT funding allocations), and Transit to Parks Strategic Plan project implementation.

Additionally, given Metro's current financial constraints, staff recommends focusing the TOC TAP program activities in the near-term on convenings (as opposed to feasibility studies) with a commitment to hold one convening in FY21 and at least two convenings a year thereafter on the above topics. Future fiscal years will fund technical assistance in the form of feasibility studies, subject to annual budget programming.

The TOC Grant Writing and Technical Assistance Guidelines (Attachment B) establish the following criteria that will be used to evaluate and prioritize jurisdiction funding requests:

- TOC Policy Goal alignment and seeking to address a TOC need
- Projects located in Equity Focus Communities or other high-need area as defined by equity methodology
- Projects that have Baselines or are prioritizing the four TOC areas identified in the near-term implementation section above
- Projects that demonstrate that equity will be an outcome
- Staffing commitment and demonstrated successful past grant performance
- Projects that demonstrate equity as a process through commitment to meaningful and inclusive stakeholder engagement
- Transit corridor timing (existing, planned, and/or environmentally-cleared transit corridor project)

### Semi-Annual Reports

TOC Plan Semi-Annual Reports will be prepared to report on progress made, lessons learned, and areas where there may be a need to course correct a program. The Semi-Annual Reports will include a status of the Baselines, a summary of grant writing assistance offered (including external resources secured/leveraged), as well as the number and type of convenings held and the number of attendees reached.

The TOC Plan is a living document that will evolve as lessons are learned over the course of implementing the various activities and reporting out through the Semi-Annual Reports. A more comprehensive TOC Plan update is anticipated after five years.

### Equity Platform

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The TOC Plan is grounded in equity and aligns with the following Equity Platform Pillars:

1. **Define and Measure** - The Baselines will be a critical resource to define community-level equity needs and measure progress in these areas over time. Additionally, the TOC Plan leverages the Equity Focus Communities (EFCs) designation as an importance tool for prioritizing TOC Plan resources.
2. **Listen and Learn** - The TOC Plan was developed through an iterative process with the TOC Policy Working Group and the new programs included in the plan, call for ground-up stakeholder engagement and collaborations with municipalities. In particular, the Baselines will be grounded in deep stakeholder engagement to ensure that the data and policy assessments are ground-truthed in community experiences.
3. **Focus and Deliver** - The Plan outlines targeted, near-term, actionable areas that Metro can tackle directly and in partnership with others, to realize equitable TOCs in Los Angeles County.

### **DETERMINATION OF SAFETY IMPACT**

These recommendations have no impacts on safety.

### **FINANCIAL IMPACT**

The proposed FY 2021 budget includes \$335,000 in Cost Center 4530, Project 401049 (Transit Oriented Communities), for a Baseline, Grant Writing Assistance, and a TOC Convening. Since this is a multi-year commitment, the Cost Center Manager and Chief Planning Officer will be responsible for budgeting in future years subject to funding availability and annual programming.

#### **Impact to Budget**

The funding for this program is from the General Fund. These funds are eligible for Metro bus and rail capital and operating expenditures.

### **IMPLEMENTATION OF STRATEGIC PLAN GOALS**

The recommendation supports Vision 2028 Strategic Plan Goals # 3 and 4.

The TOC Plan is grounded in *enhancing communities and lives through mobility and access to opportunity* (Strategic Goal 3) by working with communities to leverage the public transportation system to improve mobility and plan for equitable community development.

Additionally, the need for *transforming LA County through regional collaboration and national leadership* (Strategic Goal 4) is greater than ever and Metro is best positioned to lead and convene Los Angeles County jurisdictions to create equitable TOCs.

### **ALTERNATIVES CONSIDERED**

The Board could choose to not approve the TOC Plan or the TOC Grant Writing and Technical

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Assistance Program Guidelines. Staff does not recommend this. The Board-adopted TOC Policy calls for the TOC Plan and for Metro to report on progress through Semi-Annual Reports. Staff recommends prioritizing resources based on EFCs and programs that will support community stabilization and building Los Angeles County jurisdiction capacity in TOC areas.

### **NEXT STEPS**

Should the Board approve the recommendations, staff will: 1) initiate the Baseline solicitation; 2) take the necessary steps to launch the TOC Grant Writing and Technical Assistance Programs and engage Los Angeles County jurisdictions on program availability; and 3) hold a TOC Convening in late spring/early summer 2021.

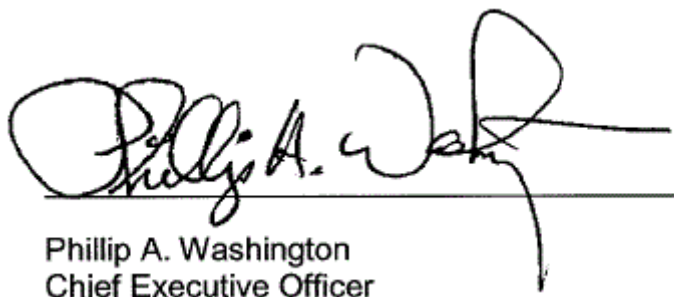
### **ATTACHMENTS**

Attachment A - TOC Implementation Plan(REVISED)

Attachment B - TOC Grant Writing and Technical Assistance Program Guidelines

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Chief Executive Officer



**Metro**<sup>®</sup>

**We're supporting  
thriving communities.**

Transit Oriented Communities Implementation Plan



## Acknowledgments

Thank you to all of the people and partners that worked with Metro on the TOC Implementation Plan. A special thanks to the TOC Policy Working Group in particular for its invaluable contribution.

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*We're in a defining moment  
of unprecedented transportation  
investments in LA County.*

**Metro has a plan to make it easier  
to get around by building dozens  
of new transit projects, tackling  
traffic and partnering to improve  
streets and create thriving  
communities for everyone.**



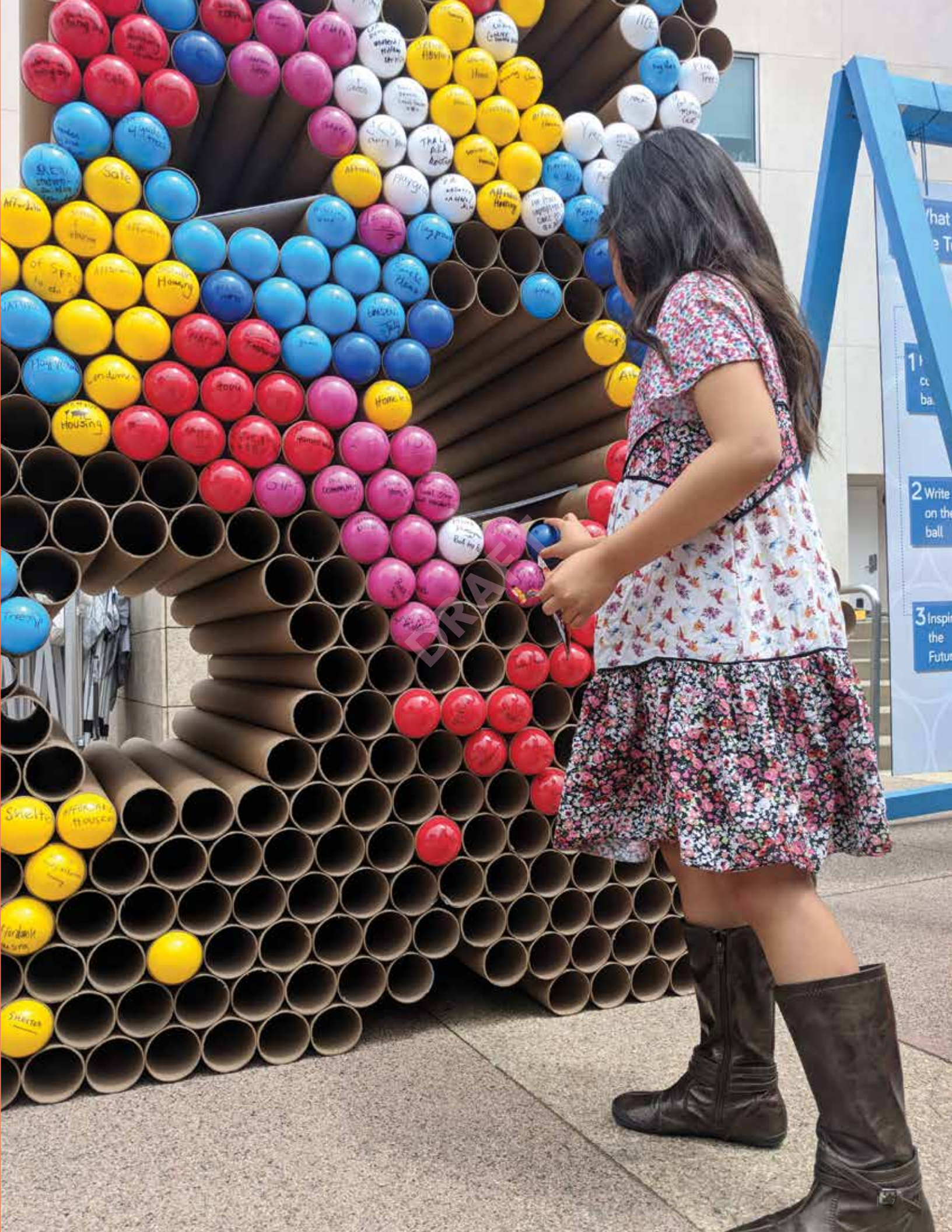




*And we want to make sure that  
no one is left behind.*

**We believe that building  
public transit projects must  
better incorporate voices from  
the community.**








**Metro's *TOC Policy and Implementation Plan* outlines how we will lead and support partners to ensure that our investments equitably benefit communities where we operate.**

***But our commitment doesn't end here; reporting will help us refine so that we can continue making progress.***



## Small Group Discussions

1. In 5 years, the Fairview Heights station will be in full operation and this neighborhood will be \_\_\_\_\_
2. What types of uses would you like to see at these sites?
3. What would be the look, feel, or design of a successful project here?
4. What are some community needs a future project here could help meet?
5. Is there a project or place you enjoy that we can look to for inspiration for these sites?
6. As Metro moves forward on this development, how do you like to stay informed and involved in the process?  
 Metro



## Executive Summary

Metro is committed to transforming mobility in LA County. Metro's Vision 2028 Strategic Plan aims for increased prosperity for all by removing mobility barriers; realizing swift and easy mobility throughout LA County anytime; and accommodating more trips through a variety of high-quality options.

The passage of Measure M has created a transformative opportunity for LA County to improve mobility for all, bring communities together and increase access to opportunity. The Transit Oriented Communities (TOC) Policy and Implementation Plan build on the Vision 2028 goals to **enhance communities and lives through mobility and access to opportunity** and to **transform LA County through regional collaboration and national leadership**.

Grounded in community development and equity, the TOC Policy and TOC Implementation Plan seek to uplift the positive benefits of the transformational transit investments that promote healthy, livable communities. Simultaneously, the plan charts a course to ensure that the positive benefits of these investments are leveraged equitably and that communities are prepared for the potential unintended consequences of gentrification and displacement pressures. Metro's TOC Policy and TOC Implementation Plan outline how Metro will lead and support others, through partnership, to ensure that Metro's investments equitably benefit all communities where Metro operates.

The TOC Implementation Plan is grounded in the following four initiatives:

- 1. Creating TOC Corridor Baselines Assessments for Metro Transit Corridors:**  
Highlights community characteristics, opportunities and needs to support communities in leveraging the positive benefits of the transit investment and preparing for potential unintended consequences.
- 2. Continually Improving Metro TOC Programmatic Areas:**  
Includes a series of actions that Metro will undertake to ensure that Metro TOC Programs align with the policy goals and outcomes.
- 3. Enhancing Metro's Internal Coordination:**  
Activities that Metro will undertake to enhance internal coordination in support of creating TOCs in LA County.
- 4. Strengthening Coordination and Collaboration with Metro's Partners:**  
Many of the activities that are critical to TOCs are outside of Metro's jurisdiction. This initiative calls for the essential ongoing coordination and collaboration with municipalities, local communities and advocacy organizations for the region to realize equitable TOCs.

The TOC Implementation Plan includes actions and measures that will be carried out within the designated timeframes in the plan. Lessons learned, adjustments and progress will be reported through Semi-Annual Reports to ensure that Metro maintains an open communication loop with the various partners that are critical realizing equitable TOCs in LA County.

## Plan Organization

This plan identifies existing and new programs and corresponding actions that Metro will carry out either directly or through partnerships to implement the policy goals. The plan includes an introduction, an overview of how this plan relates to other Metro planning efforts and a section for each of the four initiatives that are the primary implementation vehicles for this plan. It concludes with plan monitoring and next steps. The plan is organized as follows:

### 1.0 TOC Implementation Plan and Background

Describes the policy context for TOC, the process and an overview of the plan.  
Describes the plan's relationship to other concurrent Metro planning efforts.

### 2.0 Initiatives

- > Initiative 1 – Creating TOC Corridor Baseline Assessments for all Metro Transit Corridors
- > Initiative 2 – Continually Improving Metro TOC Programmatic Areas
- > Initiative 3 – Enhancing Metro's Internal Coordination
- > Initiative 4 – Strengthening Coordination and Collaboration with Metro's Partners

### 3.0 Plan Monitoring and Updates

This chapter outlines how Metro will monitor and update the plan through developing Semi-Annual Reports. The section includes details on how Metro will track implementation progress, raise lessons learned from administering the plan, enact necessary program changes and establish timing for reports and updates.

### Conclusion

The conclusion summarizes the plan and the approach for implementation.

**We will help LA County's  
communities thrive.**

DRAFT

## TOC Implementation Plan and Background

In 2016, LA County voters resoundingly approved Measure M, a \$120 billion investment in the LA County transportation system that over the next 40 years, combined with prior transportation investment commitments, service improvements and new mobility options, will transform how people travel while expanding their access to opportunities and resources across the broader LA County region. The expansion of the public transit system will make it easier, faster and safer for people to get where they need to go via public transit, while also helping the LA region meet its Greenhouse Gas (GHG) reduction goals.

This improved connectivity will dramatically enhance mobility options for communities across the region that will be more accessible and interconnected. Improved mobility and the resulting improved access to opportunity are certainly benefits for local stakeholders. However, improved public transit access also poses a risk for low-income communities, as it can result in unintended consequences such as gentrification and displacement pressures. In the face of this once-in-a-generation public transit investment, LA County finds itself in a defining moment that calls for comprehensive and urgent action to ensure that Metro's investments and services are equitable, holistic and support the rich diversity of LA County communities.

Metro is responsible for delivering this transformative public transit system that will reshape mobility in the region. This includes targeting investments towards those with the greatest mobility needs and expanding the transportation system as responsibly and quickly as possible. Ensuring that the transportation system will have the furthest reaching positive impacts on the region's existing and future residents, the climate and the economy requires consideration of the broader community context surrounding these mobility investments.

### WHAT ARE TOCs?

*Transit Oriented Communities are places that, by their design, allow people to drive less and access transit more.*

A TOC maximizes equitable access to a multi-modal transit network as a key organizing principle of land use planning and holistic community development. TOCs differ from Transit Oriented Development (TOD) in that TOD is a specific building or development project that is fundamentally shaped by proximity to transit.

#### **TOCs promote equity and sustainable living in a diversity of community contexts by:**

- > offering a mix of uses that support transit ridership of all income levels (e.g. housing, jobs, retail, services and recreation);
- > ensuring appropriate building densities, parking policies and urban design that support accessible neighborhoods connected by multi-modal transit;
- > elevating vulnerable users and their safety in design; and
- > ensuring that transit-related investments provide equitable benefits that serve local, disadvantaged and underrepresented communities.

## TOC Policy

In the context of broader planning efforts that support the realization of equitable TOCs, such as the Equity Platform and the Vision 2028 Strategic Plan, in 2018, the Metro Board adopted the trailblazing Transit Oriented Communities Policy to ensure that as Metro moves forward with improving mobility, matters of equity and the importance of safeguarding vulnerable low-income communities are prioritized, along with issues of land use, active transportation and community development.

### Metro's five TOC Policy Goals are:

- > Increase transportation ridership and choice.
- > Stabilize and enhance communities surrounding transit.
- > Engage organizations, jurisdictions and the public.
- > Distribute transit benefits to all.
- > Capture the value created by transit.

Metro's functional role is to plan, design, build, operate and maintain the regional transportation system in LA County. However, the TOC Policy acknowledges that for public transit to be successful, the planning and delivery process must leverage partnerships with community members, community based-organizations, cities, LA County, Southern California Association of Governments (SCAG) and the sub-regional Councils of Government (COGs). Achieving the goals of Measure M will require strong partnership and coordination with municipalities, policy makers and local communities in the transit investment itself and in areas of transit-supportive land use, active transportation and community development.

## TOD

Single Development  
within 1/2 mile of transit



## TOC

Integrated Community  
served by transit with mix of uses



## Plan Purpose

The TOC Implementation Plan is an action plan for Metro that will build from the policy by outlining the steps that Metro will take to carry out the policy and a process for tracking progress over time. The plan is a cross-cutting document that reflects the complexity and interrelationship of community development, land use planning, mobility and the many stakeholders that play a role in advancing equitable TOCs in LA County. The plan is organized into four initiatives:

1. Creating TOC Corridor Baseline Assessments for all Metro Transit Corridors
2. Continually Improving Metro TOC Programmatic Areas
3. Enhancing Metro's Internal Coordination
4. Strengthening Coordination and Collaboration with Metro's Partners

**For Metro**, the plan outlines a clear path enabling Metro to take actionable steps and collaborate with others to realize TOCs, track progress over time and make needed updates and adjustments along with changing conditions. The plan is intended to ensure that the realization of the public transit system equitably delivers upon improved mobility, from stakeholder engagement in planning and delivery of new public transit lines, to partnering with local communities to catalyze equitable and holistic TOCs.

**For cities and the County of Los Angeles**, the plan is a resource that presents TOC collaboration opportunities with Metro to maximize equitable community benefits of the public transit investments, build capacity, receive technical assistance and outline steps and funding opportunities that communities can pursue to realize community-specific visions of TOCs.

**For local community partners**, the plan presents Metro's commitment to work with municipalities and engage local communities. The plan will outline how Metro will work with local communities in realizing TOCs through data collection and policy assessments, with stakeholder engagement, to support municipalities and communities in realizing communities' vision of TOCs with the goal of making public transit more responsive, holistic and equitable.



## Approach to Equity

The Metro Board-adopted Equity Platform establishes four pillars for Metro to pursue to improve equitable outcomes and access to opportunity across the county. The first pillar, Define and Measure, recognizes that there must be a common basis of understanding to build an equity agenda and that equity-needs may vary across communities. Most notably, the Equity Platform recognizes that historically and currently, race and class have largely defined where these disparities are most concentrated – in low-income communities of color throughout LA County – and that age, gender, disability and residency can expand or constrain opportunities.

Truly realizing equitable TOCs in LA County will require acknowledging the role that race and class have played and continue to play in access to opportunity. At its core, this plan works to fulfill the mission of the Equity Platform to address and improve equitable outcomes and access to opportunity.

Equity and improving equitable outcomes are fundamental tenets of the TOC Policy and Plan. As such, equity will be approached in two ways in the plan: first, the Board adopted Equity Focus Communities (EFCs) will be a prioritization measure for funding programs and resources included in this plan. Second, at the community level, the TOC Plan's proposed technical assistance and grant writing programs will be focused on creating TOCs and tackling equity needs that will be defined at the community level, with race and income at the forefront.

As the TOC Plan is implemented, it will be critical for Metro to continuously engage local communities directly in areas where Metro leads or through partnership with municipalities when Metro TOC programs are utilized, to ensure that equity needs are defined at a community level.

## WHAT IS EQUITY?

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*Equity is both an outcome and a process to address racial, socioeconomic and gender disparities, to ensure fair and just access – with respect to where you begin and your capacity to improve from that starting point – to opportunities, including jobs, housing, education, mobility options and healthier communities. It is achieved when one's outcomes in life are not predetermined, in a statistical or experiential sense, on their racial, economic or social identities. It requires community-informed and needs-based provision, implementation and impact of services, programs and policies that reduce and ultimately prevent disparities.*

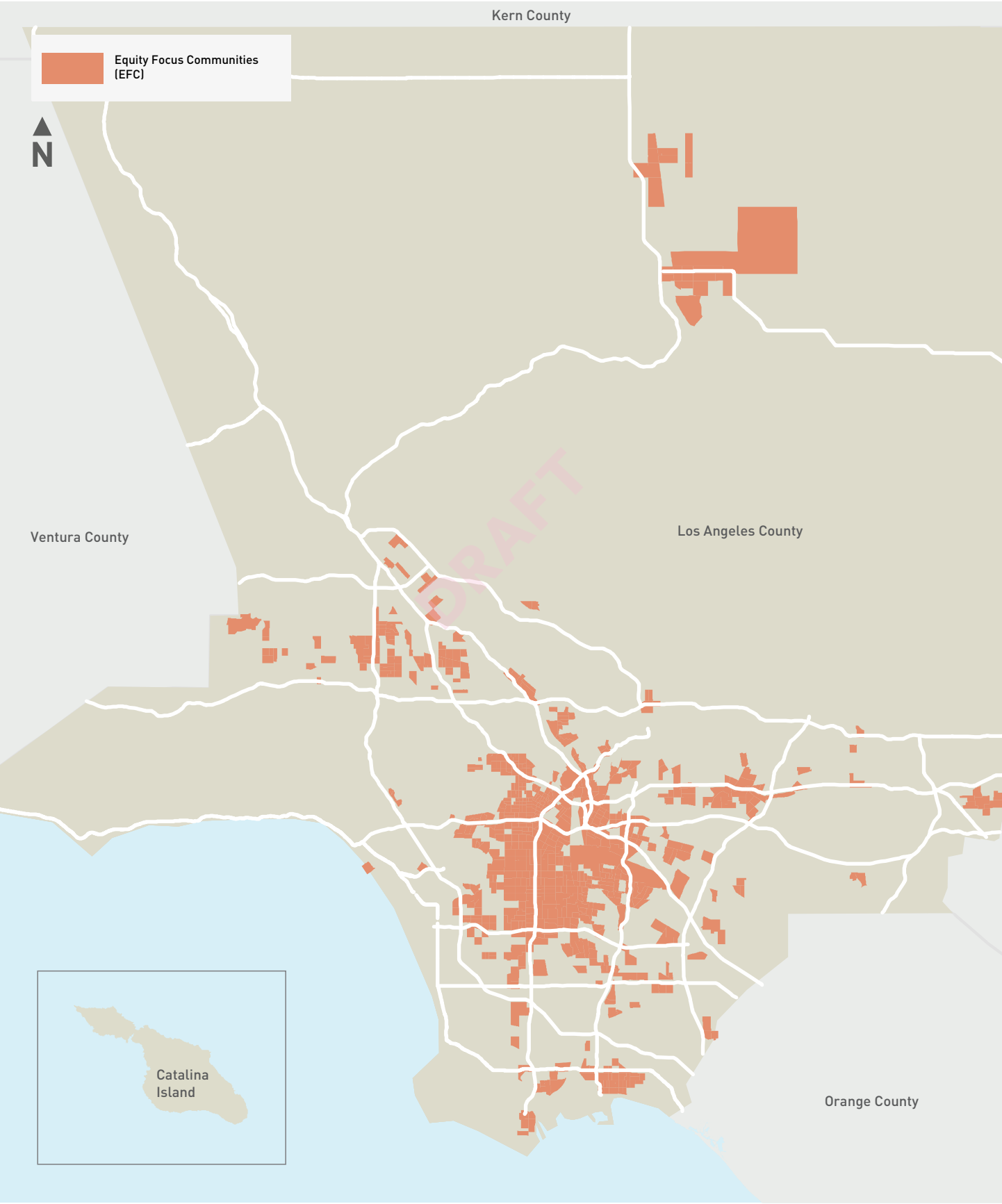
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## Equity Focus Communities

In June 2018, the Metro Board adopted Equity Focus Communities (EFCs) to identify areas of need. EFCs include census tracts with:

- > at least 40% of households are low-income (\$35,000 or less), and
- > at least 80% are households of color, or
- > at least 10% of households have zero cars

METRO DESIGNATED EQUITY FOCUS COMMUNITIES





## Process for Developing this Plan

The plan was developed with input and collaboration from Metro internal departments, community-based organizations and municipal partners:

- > **2018:** Feedback was provided by the TOC Policy Working Group during the TOC Policy and Framework process. The TOC Policy Working Group includes representatives from Metro's Policy Advisory Council (PAC), cities, Councils of Government, the Southern California Association of Governments (SCAG) and advocacy organizations.
- > **2018/2019:** A series of focus group meetings were held with LA County municipalities.
- > **2019/2020:** TOC Policy Working Group was convened on a regular basis between January 2019 and September 2020 to inform the development of the TOC Implementation plan through discussions at working group meetings and supported with written comments. The plan development was an iterative process allowing for multiple rounds of feedback on the draft, the corridor analysis data needs, the initiatives and ideas on stakeholder engagement.

The plan development process included coordination within Metro with staff from various departments, including staff leading concurrent and related planning efforts, such as the Long Range Transportation Plan, Moving Beyond Sustainability Strategic Plan, Vision 2028 Strategic Plan and the Metro's CBO Partnering Strategy.

LA County finds itself in a defining moment that calls for comprehensive and urgent action to ensure that Metro's investments and services are equitable, holistic and support the rich diversity of LA County communities.



## TOC Relationship to Other Metro Plans

The plan was developed concurrently with Metro's other comprehensive, equity-focused efforts. Each of these concurrent planning efforts are highlighted, as is their relationship to the TOC Policy and Implementation Plan.

### *Measure M Guidelines (2017)*

#### **What is it?**

Guidelines that address all aspects of administering and overseeing Measure M.

#### **Relationship to plan?**

The Measure M Guidelines establish the eligible projects and uses that can be funded with Measure M Local Return Funds. The Measure M Guidelines introduced 'TOC Investments' as eligible uses for local return expenditures. TOC Investments were further defined as 'TOC Activities' in the TOC Policy that was adopted by the Board in 2018.

The TOC Plan is the implementation vehicle of the policy and includes a series of actions that municipalities can pursue, with local return, to advance equitable TOCs in LA County.

### *Vision 2028 (2018)*

#### **What is it?**

Strategic plan that aligns all of Metro's services, programs and projects over the next 10 years. The plan lays out a Metro's vision to improve mobility and quality of life for everyone in LA County.

As outlined in the *Vision 2028 Strategic Plan*, Metro's visionary outcome is to double the share of transportation modes other than solo driving. The plan details five goals:

- 1 Provide high-quality mobility options that enable people to spend less time traveling**
- 2 Deliver outstanding trip experiences for all users of the transportation system**
- 3 Enhance communities and lives through mobility and access to opportunity**
- 4 Transform LA County through regional collaboration and national leadership**
- 5 Provide response, accountable and trustworthy governance within the Metro organization**

#### **Relationship to plan?**

This plan falls under the umbrella of the Vision Strategic Plan 2028, most specifically the third goal that calls for enhanced communities and lives through mobility and access to opportunity. The Vision 2028 Strategic Plan plays a critical role in realizing the outlined goals to provide mobility options, enhance communities and access to opportunity through transportation and transform LA County through regional collaboration.

Figure 7

## Metro's Framework for Improving Mobility in LA County

### We're guided by our *Strategic Plan* goals.

 *Vision 2028 Strategic Plan*

#### We're creating

#### ① *Faster Travel Options*   ② *Better Trips*   ③ *Thriving Communities*

##### *Better Transit*

Providing more transit options with improved quality and service

*Transit Projects*

*Bus Improvements*

*New Mobility Options*

##### *Less Congestion*

Managing the transportation system to reduce the amount of time people spend in traffic

*Roadway Improvements*

*Congestion Management*

*Goods Movement*

##### *Complete Streets*

Making streets and sidewalks safe and convenient for everyone, to support healthy neighborhoods

*Bike and Pedestrian Projects*

*Local Street Improvements*

*Station and Stop Access Enhancements*

##### *Access to Opportunity*

Investing in communities to expand access to jobs, housing and mobility options

*Workforce Initiatives*

*Support for Local Businesses*

*Transit Oriented Communities*

 *Long Range Transportation Plan*

#### We're committed to

#### ④ *Leadership*   ⑤ *Accountability*



Collaboration



Continuous Improvement



Customer Focus



Innovation



Inspired and Inclusive Workforce



Safety



*Customer Experience Plan*



*COVID-19 Recovery Plan*

### We're intentionally focused on *eliminating racial and socioeconomic disparities and advancing sustainable practices in everything we do.*



Equity



Sustainability



*Equity Plan*



*Moving Beyond Sustainability Plan*

### *Equity Platform (2018)*

**What is it?** Multi-point Equity Platform built around four pillars: Define and Measure, Listen and Learn, Focus and Deliver and Train and Grow. Following the precedent set by Measure M, it is intended to help identify and implement projects or programs that close or eliminate gaps in equity across LA County.

**Relationship to plan?** The TOC Plan is grounded in the Equity Platform’s acknowledgement that historically and currently, race and class have largely defined where these disparities are most concentrated – in low-income communities of color throughout LA County – and that age, gender, disability and residency can expand or constrain opportunities. Truly realizing equitable TOCs in LA County will require acknowledging the role that race and class have played and continue to play in access to opportunity. At its core, this plan works to fulfill the mission of the Equity Platform to address and improve equitable outcomes and access to opportunity.

### *Equity Activation Plan (2019)*

**What is it?** Highlights a broad portfolio of current/planned projects and new initiatives that work towards realizing the goals embedded within the four pillars of the Equity Platform. The Equity Activation Plan highlights projects/ initiatives that correspond to each pillar.

**Relationship to plan?** The policy is explicitly identified in the second pillar, “Listen and Learn,” as a policy that will strengthen the relationship between Metro and the LA County Community. In the same pillar, the Community-based Organization Partnering Strategy (outlined on page 23) is identified, which will be a measure in the Baseline Corridor Assessments of the plan. Additionally, the plan relates to the first pillar, “Define and Measure,” adopted by the Metro Board in June 2019.



### *Moving Beyond Sustainability Plan*

**What is it?** An agency-wide plan that consolidates the sustainability activities of Metro into a comprehensive roadmap for conserving resources, reducing emissions, improving operational efficiency and improving the overall health and safety of Metro employees, the public and the environment.

**Relationship to plan?** This plan and the Moving Beyond Sustainability Plan are mutually-reinforcing in their shared goals of supporting compact, transit-friendly communities that enable low-carbon mobility choices and infusing the principles of equity into the decision-making process.

### *Long Range Transportation Plan*

**What is it?** The Long-Range Transportation Plan (2020 LRTP) will outline what Metro is doing currently and what Metro must do to lead and advance the transportation system improvements necessary to bring about the economic, mobility, safety, environmental and quality of life benefits needed in LA County. Current challenges present great opportunities for Metro to take bold action and help achieve our vision for the region.

**Relationship to plan?** Following the goal of the Equity Platform's first pillar to "Define and Measure," the Long Range Transportation Plan established a Metro Board-adopted definition of "Equity Focus Communities" (EFCs).

### *Community-based Organization Partnering Strategy (anticipated 2020)*

**What is it?** Metro is strengthening its relationships with community-based organizations and in so doing, ensuring that those relationships and partnerships align with the Equity Platform Framework to continue reaching LA County's most vulnerable populations, including those in urban and rural areas, ethnic and cultural groups, underserved and under-represented communities, populations with limited education attainment and people with disabilities.

**Relationship to plan?** Creating an agency-wide CBO Partnering Strategy will be integral to realizing TOC Policy goals and the plan. The strategy will identify consistent and equitable ways that Metro can partner with CBOs.

# We will act boldly to effect real change.

The plan charts a course to ensure that the positive benefits of these investments are leveraged equitably and that communities are prepared for the potential unintended consequences.

This section describes the purpose, strategies of and activities to be undertaken and measured within the four initiatives that underpin this plan.

## TOC Implementation Plan Initiatives

### > **Initiative 1 – Creating TOC Corridor Baseline Assessments for all Metro Transit Corridors:**

Baseline Assessments are a snapshot of where communities are today. They will be a resource of information for municipalities and community members that will highlight positive opportunities to leverage the transit infrastructure investments for equitable TOCs and identify potential risks and vulnerabilities. The Baseline Assessments will also identify what tools and resources municipalities can best deploy to respond to their specific conditions and best leverage the transit investment for community benefits and to address the potential challenges.

### > **Initiative 2 – Continually Improving Metro TOC Programmatic Areas:**

Enables Metro to continue to track the impacts of transit investment; to integrate TOC into its programs by providing resources and information to its partner cities through grant writing assistance, station areas planning assistance, case studies and tools, etc.; and on an ongoing basis to continually improve upon TOC Programmatic areas.

### > **Initiative 3 – Enhancing Metro’s Internal Coordination:**

Identifies a series of internal collaboration opportunities that Metro will undertake to realize equitable TOCs in areas that are within Metro’s functional jurisdiction, such as through identifying joint development sites and incorporating TOC goals and tasks in the Measure M corridor delivery process.

### > **Initiative 4 – Strengthening Coordination and Collaboration with Metro’s Partners:**

Many of the community development policies and programs that are integral to realizing TOCs are outside of Metro’s functional jurisdiction. Strengthening coordination and collaboration with Metro’s partners will include a series of strategies that Metro can use to realize equitable TOCs through coordination and collaboration with Metro’s many partners, including local municipalities.



## INITIATIVE 1

# We will create TOC Corridor Baselines Assessments.

This initiative includes snapshots of community characteristics, including areas where partnership and support could help leverage positive benefits and prepare for potential unintended consequences of transportation investment.







# Creating TOC Corridor Baseline Assessments

The TOC Corridor Baseline Assessments (Baselines) will be prepared in partnership with municipalities and with deep stakeholder engagement throughout the process. In addition, Metro is committed to partnering with academic institutions and Community Based Organizations on the Baseline development. The Baselines will serve as a resource providing data and policy information that will inform a series of recommended TOC related strategies for municipalities.

To start, Metro will prepare a TOC Corridor Baseline Assessment (Baseline) for each Measure M Transit and Active Transportation Corridor. Upon completing Baselines for Measure M corridors, Baselines will also be prepared for existing transit corridors. An individual Baseline report will be prepared for each municipality with a station along the corridor. The following three factors will be considered when sequencing the preparation of Baselines for Measure M corridors: when a transit corridor alignment, or locally preferred alternative (LPA), is selected, transit corridor open dates and whether a transit corridor is within an EFC. Upon completing the Measure M Transit Corridor Baselines, Metro will initiate Baselines for existing transit corridors, using EFCs as a prioritization factor.

The TOC Plan calls for Baseline Assessments to be ground-truthed with local communities. In this context, ground-truthing means that Metro will engage local community members on the Baseline development process to ensure that the data and policy findings and recommendations are an accurate reflection of what community members are experiencing 'on the ground' in their communities and the interventions that may be needed to realize equitable TOCs. Each Baseline will include:

- > Demographic mobility, land use and economic data assessment to establish existing conditions related to the TOC Policy's five goals and subgoals, with stakeholder engagement to ground-truth the data assessment findings;
- > An inventory and assessment of existing municipal policies and programs that are integral to TOC realization; and

## WHAT ARE BASELINES?

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- > Recommended strategies and partnership opportunities for municipalities to leverage the transit infrastructure for equitable TOCs.

*TOC Corridor Baseline Assessments are a snapshot of where communities are today. They will be a resource of information for municipalities and community members that will highlight positive opportunities to leverage the transit infrastructure investments for equitable TOCs and identify potential risks and vulnerabilities. The Baseline Assessments will also identify what tools and resources municipalities can best deploy to respond to their specific conditions and best leverage the transit investment for community benefits and to address the potential challenges.*

*This focus on data trends is intended to illuminate how each community is changing over time, ways to maximize the benefits of transit investments potential vulnerabilities to the*

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*adverse impacts of infrastructure investment, and to ensure that municipalities and local communities are provided with detailed information on what they need to do to be “transit equity ready.”*

## Data Assessment

The data assessment will be prepared for each municipality as a first step in identifying specific strategies that jurisdiction can use to achieve TOCs. The data will identify existing community characteristics and examine opportunities to achieve the positive benefits called for in the TOC policy, as well as potential community risks and vulnerabilities that will in turn inform the policy/planning assessments. The data will highlight trends, over a 15-year time frame, as appropriate given data availability.

This focus on data trends is intended to illuminate how each community is changing over time, ways to maximize the benefits of transit investments, potential vulnerabilities to the adverse impacts of infrastructure investment and to ensure that municipalities and local communities are provided with detailed information on what they need to do to be “transit equity ready.”

The data trends will reflect the five TOC Policy goals and subgoals, as available, such as:

- > Key community socioeconomic vulnerabilities, such as the prevalence of low-income households, limited English-proficiency, zero vehicle households, low educational attainment, housing and transportation cost burden and similar factors.
- > Mobility trends such as transit ridership, options and frequencies, mode share, vehicle ownership and injuries and deaths from collisions.
- > Land uses that can enhance or hinder transit use and safe multi-modal mobility including zoning, walkability, space dedicated to parking and access to community asset that enhance healthy living (affordable housing, grocery stores, daycare centers, health centers, parks, open space and recreational facilities, schools, employment centers and similar).
- > Economic and real estate factors that can inform strategies for joint development and value capture, including land costs, commercial rents and vacant and underutilized properties.

The data assessments will be ground-truthed through stakeholder engagement to ensure that an accurate depiction of community characteristics are noted during this phase of the process.

Example data factors:

- > **Median Household (HH) Income Distribution:** HH income is closely linked to both transit ridership and car ownership
- > **Ethnicity:** Historically, Metro’s public transit ridership profile is heavily oriented towards non-white populations
- > **Car Ownership Distribution:** Zero-car and car-lite households ride public transit at higher rates
- > **Population Density/Household Size/Dwelling Units:** Key variable in public transit ridership, ridership potential and understanding of displacement potential
- > **Employment in Place:** Can illustrate existing commute patterns and commute distance
- > **Housing Tenure Distribution:** Provides a profile of the preponderance of renter versus owner households
- > **Age Distribution:** Can illuminate an age profile of different populations and public transit service needs
- > **Crash Rate/Collision Factors for Pedestrians and Bicyclists:** Identification of hot spots/corridors that would benefit from First/Last Mile investments
- > **College Educated Population Change Over Time:** Education change can be a signal of market changes in an area



## Stakeholder Engagement

In partnership with local municipalities, local community stakeholders will be engaged in the Baseline development. Stakeholder engagement will allow Metro and municipalities to hear from local stakeholders to ground truth the data findings and to understand communities' current needs related to TOCs (such as land use conditions and access to opportunities) to inform the recommended strategies that come from the Baselines. Municipalities and stakeholders will be engaged in the data/policy assessment phase, as well as in the recommended strategies phase of the baseline development.

The stakeholder engagement effort for each Measure M Corridor will be integrated with ongoing planning studies, whenever possible.



## Policy and Planning Assessment and Recommendations

The data collection and stakeholder feedback together will highlight some of the qualitative questions that will be asked as part of the policy/planning assessments to align the evaluation and ultimately identify the recommended strategies, with the policy goals and the desired equitable outcomes. The data and policy assessments and stakeholder engagement will inform each Baseline's recommended strategies. The recommendations will outline the type of activities that will need to be deployed by municipalities, with Metro support and in concert with local communities to achieve TOCs. As an example, high transportation and housing cost burden may result in the evaluation identifying a need for new/updated affordable housing and anti-displacement policies: high collision rates for pedestrians and bicyclists may indicate a need for updating bike/pedestrian plans and/or the implementation of existing plans that have not been implemented and similar. Additionally, Metro will use the assessments to identify the need to revamp existing Metro tools, create new tools or disseminate information to ensure that the tools and resources are readily accessible to municipalities.

Metro will track and report on the number of Baselines prepared for Measure M Transit Corridor municipalities and the number of municipalities that utilize Metro programs (grant writing or technical assistance) to implement the Baseline recommendations via the TOC Plan Semi-Annual Reports.

A high-level, corridor-wide update will be undertaken for each Baseline after five to seven years that highlights community characteristics and TOC policy landscape.

Appendix 2: Baseline Framework, outlines the framework that will be utilized to inform the preparation of the Metro TOC Corridor Baseline Assessments.

## How to Read the Implementation Matrices for Initiatives 2–4

Metro's role as both a leader and a partner for helping municipalities achieve equitable TOC outcomes is described in the following three initiatives. Initiatives 2-4 are organized in a matrix format. Each initiative includes strategies and actions, defines whether Metro leads or supports in implementation, identifies measures and cross references the action against the five policy goals. The terms are defined as follows:

- > **Strategies:** Outcomes that Metro seeks to achieve through plan
- > **Actions:** Programs that will be continued or created to achieve the initiative strategies
- > **Measures:** Measurable activities that Metro will achieve, track and report on in the Semi-Annual Reports
- > **Timeline:** Each action item has an associated timeline related to how long it will take to start up a new program and/or whether the action is an ongoing activity that Metro will realize
- > **Leads or Supports:** Defines whether Metro leads an activity (within Metro's functional responsibility) or whether Metro incentivizes, enables or encourages others to execute the activity when the activity is outside of Metro's direct control

An example matrix is shown below.

### Strategy: Outcome that Metro seeks to achieve through plan

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
Program that will be continued or created to achieve the initiative strategy	A measurable activity that Metro will achieve, track and report on in the Semi-Annual Reports	Shown in years	●	
	# Number	Ongoing		●
	\$ Dollar amount			
	% Percentage			
	> Deliverable			

## INITIATIVE 2

# We will continually improve our TOC programmatic areas.

This initiative includes actions for Metro to focus on TOC policy goals and to constantly learn and improve our efforts.









# Continually Improving TOC Programmatic Areas

**Initiative 2, Continually Improving Metro's TOC Programmatic Areas**, outlines activities that are specific to Metro's TOC unit, described below, within the Metro Countywide Planning & Development Department. The Transit Oriented Communities (TOC) unit consists of the following four groups:

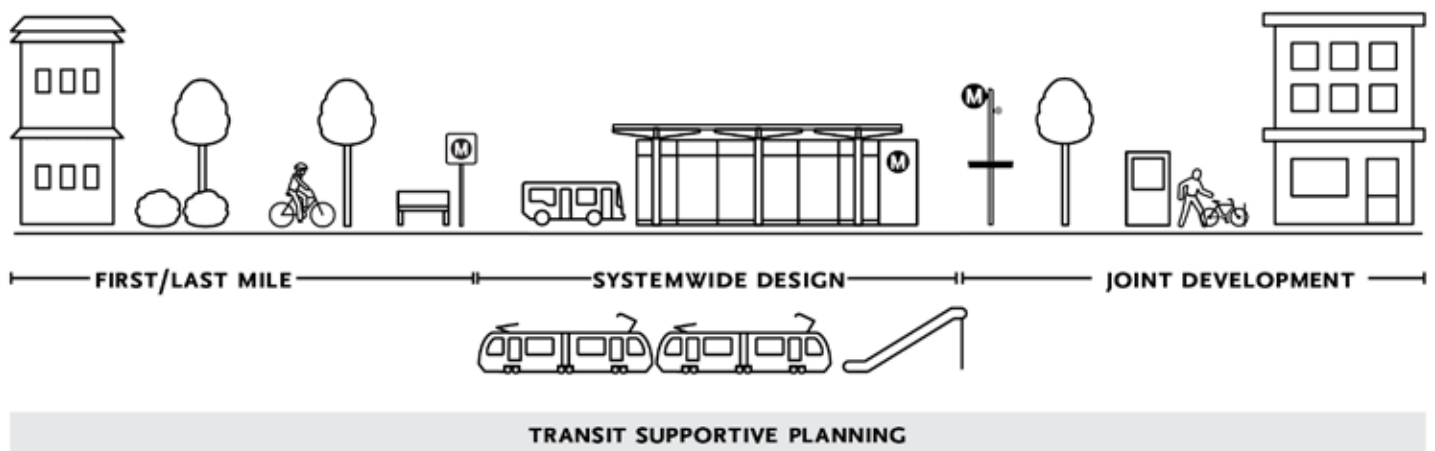
- > The Joint Development team works with local communities and developers to develop viable Metro-owned properties that are undeveloped after the public transit infrastructure is built. The joint development process is outlined in the Joint Development Policy.
- > The First/Last Mile (FLM) team works with local communities to develop First/Last Mile Plans for all Measure M corridors. The FLM team's work is guided by the agency's FLM Policy, as well as its First/Last Mile Strategic Plan and Active Transportation Strategic Plan.
- > The Systemwide Design team reviews station design of all Measure M corridors focusing on:
  - Providing a safe, accessible and comfortable Metro experience
  - Connecting Metro stations to the greater regional transit network
  - Orienting stations to neighborhood destinations and pedestrian routes
  - Improving the durability of Metro's infrastructure to reduce maintenance
  - Supporting the vision of transit-oriented communities

> TOC Strategic Initiatives group administers Metro's Transit Supportive Planning efforts that include:

- TOD Planning Grant Program
- The Transit Supportive Planning Toolkit
- Metro's Adjacent Development Review functions
- Metro's Union Station redevelopment program
- Mobility Corridor Integration
- The Policy and Planning group is also lead for the West Santa Ana Branch TOD Strategic Implementation Plan (TOD SIP) and is responsible for developing the TOC Implementation Plan.

The activities envisioned to be undertaken in Initiative 2 will address two strategies:

- > Strategy 2.1 Implement Metro TOC Programmatic Areas (Joint Development, First/Last Mile, Systemwide Design and TOC Strategic Initiatives) programs and tools in alignment with policy goals
- > Strategy 2.2 Improve effectiveness of existing TOC programmatic areas and respective programs and tools



\*NOT TO SCALE

## Strategy 2.1 Implement Metro TOC Programmatic Areas, including programs and tools in alignment with Policy Goals.

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
2.1a. Facilitate construction of affordable housing units in the Metro Joint Development portfolio.	# Affordable units (and affordability levels) for residents earning 60% or less than AMI of Metro Joint Development projects (planned and completed)  % Affordable units, portfolio-wide	Ongoing	●	
2.1b. Evaluate Metro Joint Development Policy to strengthen commitment to addressing the affordable housing crisis through additional tools and policies.	> Memo summarizing tools/policies to increase affordable housing production  > Board adoption of update Joint Development Policy	Ongoing	●	
2.1c. Develop First/Last Mile Plans for Metro transit projects.	# FLM plans by station areas	Ongoing	●	
2.1d. Support municipalities in implementing First/Last Mile Plans for existing and new Metro transit stations.	# Grant writing assistance provided  # Funded projects	Ongoing		●
2.1e. Implement Measure M Active Transport Program (MAT Program) and fund active transportation projects using the MAT program.	# Projects selected for funding	Ongoing	●	
2.1f. Support implementation of active transportation projects using MAT Program.	# Transit stations/stops funded for FLM improvements  # Linear miles of corridor funded projects	1		●
2.1g. Pursue discretionary funding opportunities for Transit to Parks Strategic Plan activities, including providing grant writing assistance to eligible partner agencies and nonprofits.	# Grant applications, inclusive of grant writing assistance and grants applied for directly	2	●	
2.1h. Collaborate with LA County Parks and Rec to determine a baseline number of LA County residents who lack a 10-minute walk or ride to a park. Support LA County Parks and Rec in updating the data in congruence with the LA County Park Needs Assessment every five to eight years.	> One report within five years within goings-on updates on five-year cycles	5		●

## Strategy 2.1 Implement Metro TOC Programmatic Areas, including programs and tools in alignment with Policy Goals. *(continued)*

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
2.1i. Conduct Design Review for new Measure M stations as part of the Systemwide Design Process to ensure compliance with systemwide station design standards and transit station design best practices.	# Stations	Ongoing	●	
2.1j. Deploy Metro Affordable Transit Connected Housing (MATCH) Program.	# MATCH loans \$ Loans provided # Units	Ongoing	●	
2.1k. Provide Technical Assistance around value capture to Measure M cities.	# Meetings held with municipalities where technical assistance was provided	Ongoing	●	
	# Potential districts advanced for further study	Ongoing		●
2.1l. Summarize Lessons Learned from TOD Planning Grant Program Rounds 1-5 and evaluate need for land use planning funding in LA County upon administering grant writing and technical assistance program for one year.	> TOD Planning Grant Program Lessons Learned > Funding need findings	2	●	
2.1m. Support Rounds 1-5 of the TOD Planning Grant Program Grantees in advancing equitable transit supportive plans.	# Metro staff coordination meetings with Grantees # Technical assistance provided with Strategic Advisor	Ongoing		●
2.1n. Support the retention of small businesses with loans that leverage public, private and philanthropic partnerships to catalyze investment in and preservation of small businesses near transit.	# Loans	Ongoing	●	

## Strategy 2.2 Improve effectiveness of existing TOC programmatic areas and respective programs and tools.

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
2.2a. Increase partner awareness of the existing programs and tools and establish process to receive stakeholder input on the effectiveness of TOC programs/tools and potential improvements.	# Partners briefed on available TOC programs and tools as part of the TOD Planning Grant Program and TOC Corridor Baseline Assessment processes	Ongoing		●
2.2b. Use the TOC Corridor Baseline Assessments to inform TOC Programmatic Area improvement areas such as updates to the Transit Supportive Planning Toolkit tools, based on feedback received during the TOC Corridor Baseline Assessments.	# Tools updated or developed	3	●	

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## INITIATIVE 3

### We will enhance our internal coordination.

This initiative includes activities that help Metro better align its work to support the creation of transit-oriented communities.







# Enhancing Metro's Internal Coordination

## Initiative 3: Enhance Metro's Internal Coordination

includes actions that Metro can use to help achieve the TOC Policy goals through enhanced internal coordination. Important collaboration opportunities will lie within the Metro Countywide Planning & Development, Communications, Program Management, Operations, the Office of Extraordinary Innovation and Grants Management.

As the regional transportation agency and primary driver for enhanced mobility in LA County, Metro is a critical player in shaping the future of the region. Enhancing Metro's internal coordination around equitably attaining TOCs addresses three strategies that were informed by active concurrent planning efforts, feedback from the TOC Policy Working Group and focus group meetings held with municipalities.

The three strategies associated with this initiative include:

- > Strategy 3.1 Integrate TOC planning into the Measure M Corridor delivery process
- > Strategy 3.2 Increase equitable partnership opportunities with Community-Based Organizations (CBOs)
- > Strategy 3.3 Expand Metro staff capacity and training in TOC areas

## Strategy 3.1 Integrate TOC planning into the Measure M corridor delivery process.

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
3.1a. Identify opportunity sites for joint development in each Measure M Transit corridor.	# Potential sites identified	Ongoing	●	
3.1b. Incorporate TOC Goals and tasks (ex FLM planning, SWD review) into contractor scopes of work for corridor delivery process.	# Scopes of work that include TOC elements/tasks in corridor planning contracts	Ongoing	●	
3.1c. Work with the Mobility Corridor Planning Group and Communications to improve Metro's coordination through development of Standard Operating Procedures (SOPs) during the development of the TOC Corridor Baseline Assessments for Measure M Corridors.	<ul style="list-style-type: none"> <li>&gt; Establish coordination SOPs for TOC integration into corridor planning projects</li> <li>&gt; Establish approach to coordinating TOC Corridor Baseline Assessments with the Mobility Corridor stakeholder engagement process, as feasible</li> </ul> # Corridor planning meetings that include TOC Corridor Baseline Assessment engagement	1	●	

## Strategy 3.2 Increase equitable partnership opportunities with Community-Based Organizations.

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
3.2a. Work with Community Relations, County Counsel, Office of Equity and Race, Procurement and other Metro departments to develop an equitable, agency wide CBO Partnering Strategy.	> CBO Partnering Strategy	Ongoing	●	

## Strategy 3.3 Expand Metro staff capacity and training in TOC areas

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
3.3a. Train Metro staff on TOC Policy goals through provision of annual trainings.	# Annual TOC staff trainings # Metro staff in attendance	Ongoing	●	
3.3b. Coordinate with Equity Officer on TOC Plan implementation and opportunities to maximize Equity Platform integration, including operationalizing Metro's Equity definition and related tools.	> Metro Equity definition	Ongoing	●	●



## INITIATIVE 4

# We will strengthen external coordination and collaboration.

This initiative includes partnerships with municipalities, local communities and advocacy organizations for the region, is the only way Metro can provide support for the realization of equitable TOCs.





# Strengthening Collaboration with Metro's Partners

**Initiative 4 addresses the need for stronger external partnership as another key ingredient for delivering equitable TOCs.** Many of the policies, plans and programs that influence the realization of TOCs are outside of Metro's direct functional jurisdiction, including land use planning, oversight and responsibility for the public right of way, complementary infrastructure investments made by other regional and local entities, regional grant making programs, affordable housing and anti-displacement policies/funding and local economic development programs, including small business assistance programs.

Strengthening coordination and collaboration with Metro's partners addresses the following five strategies:

- > Strategy 4.1 Improve technical capacity and increase funding for TOC-related activities by providing grant writing and technical assistance
- > Strategy 4.2 Improve education and information around TOC issues and TOC supportive policies
- > Strategy 4.3 Support state and federal policy and funding legislation to advance TOC goals and outcomes
- > Strategy 4.4 Collaboration with partners to leverage corridor assessments to support TOC Implementation in Measure M corridors
- > Strategy 4.5 Improve the accessibility of Metro resources and provide funding information for partners

In 2018 and 2019, Metro engaged a group of LA County cities and LA County to solicit input on how Metro could better partner in helping municipalities in planning for TOCs. The meetings with the municipal representatives helped raise key collaboration issues and identify potential opportunities. The topics that were raised in those discussions included the need for funding, grant writing and technical assistance, access to data, messaging assistance and best practice knowledge sharing.

The fourth initiative outlines a series of new programs and activities that Metro will establish to partner with local municipalities, other public agencies and philanthropy to build greater coordination for TOC planning in the region. Through partnership with municipalities, stakeholders and CBOs, Metro will maintain a continual feedback loop for information sharing and improvement of Metro programs and tools.

Essential ongoing partnership opportunities include:

- > Partnership with municipalities to coordinate on TOC community development, land use planning, the TOC Corridor Baseline Assessments and stakeholder engagement.
- > Partnership with CBOs through ongoing project engagement and the recommendations that come from the CBO Partnering Strategy.
- > Collaboration with SCAG and municipal partners on a coordinated housing strategy supporting production for all income levels, on TOC-related legislative and funding activity and to help municipalities secure funding for TOC projects and outcomes.

Feedback and ongoing communication with external stakeholders and partners will also provide a "feedback loop" for Metro's internal programs. As Metro works with these partners and stakeholders, ongoing input communication can also be used to further refine Metro's TOC-related case studies and other program offerings identified in Initiative 2.

## TOC Technical Assistance Program and TOC Grant Writing Assistance

The TOC Plan establishes a TOC Technical Assistance Program (TOC TAP) and TOC Grant Writing Assistance Program to support local municipalities, prioritizing LA County's EFCs, in building local capacity and securing funding to realize equitable TOCs.

The TOC TAP will make professional services available for municipalities to build staff capacity in TOC areas and/or explore the feasibility of implementing TOC programs through market studies, transportation or land use studies (including affordable housing and community stabilization), utility studies that can evaluate needed utility upgrades that may be required to accommodate land use planning, environmental remediation studies and similar. Additionally, the TOC TAP includes Metro-hosted convenings with LA County municipalities and partners, as a forum for LA County municipalities (staff, elected officials and commissioners), to facilitate exchange of ideas and lessons learned, provide joint training opportunities in a time- and cost-efficient manner and structure and deliver targeted TOC technical assistance.



The TOC Grant Writing Assistance Program will be available to municipalities that are seeking to apply for grants to implement TOC activities as defined in the policy. Metro will make grant writers available to LA County municipalities that seek to implement TOC activities in their communities, prioritizing EFCs and other high-need communities, based on socio-economic factors, as deemed relevant.

Municipalities for which Baselines have been prepared will be encouraged to utilize the TOC TAP and TOC Grant Writing assistance to carry out the Baseline TOC recommended strategies. Municipalities that do not yet have a Baseline will be able to utilize the TOC TAP and TOC Grant Writing program if they are seeking to carry out TOC activities around the following TOC core areas:

- > Affordable Housing Production, Preservation and Tenant Protections
- > Community Stabilization (including anti-displacement strategies for housing and small businesses)
- > Regional Housing Needs Assessment (RHNA) compliance activities, aligned with TOC Policy Goals
- > First/Last Mile, MAT project implementation and Transit to Parks Strategic Plan (only grant writing assistance)

For the MAT, LA County municipalities, Caltrans, State and Federal agencies and transit agencies are eligible to receive funding through this program. For the Transit to Parks, LA County municipalities, transit agencies and nonprofits are eligible for the Grant Writing Assistance Program.

### TOC Activities as Defined by the TOC Policy

GENERAL ACTIVITIES	WITHIN THREE MILES OF A STOP*	WITHIN A HALF MILE OF A STOP
<ul style="list-style-type: none"> <li>&gt; Community engagement that targets harder-to-reach communities around/regarding TOC activities or transit</li> <li>&gt; Events or programs that promote multi-modal transit options</li> <li>&gt; Discounted transit passes</li> <li>&gt; Grants and/or technical assistance to support projects and programs that achieve TOC goals</li> <li>&gt; Transportation-related workforce training and education</li> </ul>	<ul style="list-style-type: none"> <li>&gt; First/last mile improvements</li> <li>&gt; Complete streets</li> <li>&gt; Land use planning that promotes TOC goals</li> <li>&gt; Value capture studies and formation activities that support investment in TOCs. A value capture district must include at least one Major Transit Stop, but may span a broader radius around that Major Transit Stop</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Public improvements that create stronger and safer connections to transit and improve the transit rider experience recognizing vulnerable users and their safety in design.</li> <li>&gt; Affordable housing: Programs that produce, preserve and protect affordable housing through preservation or development of affordable housing units, and through innovative anti-displacement strategies to protect and retain low-income households.</li> <li>&gt; Small business preservation: Programs that support and protect small businesses.</li> <li>&gt; Neighborhood-serving amenities: Programs that preserve, protect and/or produce neighborhood-serving amenities.</li> </ul>

\* **Major Transit Stop**, per California Public Resource Code 21064.3, which may be amended from time-to-time, is defined as:

- (a) An existing rail or bus rapid transit station (PRC 21060.2).
- (b) A ferry terminal served by either a bus or rail transit service.
- (c) The intersection of two or more major bus routes with a frequency of service interval 15 minutes or less during the morning and afternoon peak commute periods.

Per the intent of the TOC Policy, Major Transit Stop shall also include an environmentally-cleared fixed-guideway transit station. A planned fixed-guideway station may also be considered if its location is the only alternative under consideration for a transit corridor in the planning stages.

## Strategy 4.1 Improve technical capacity and increase funding for TOC projects by providing grant writing and technical assistance.

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
4.1a. Establish a TOC grant writing assistance program grounded in TOC incentives and requirements to support municipalities in securing funding for TOC activities. EFCs will be a prioritization measure.	<ul style="list-style-type: none"> <li>&gt; Established grant writing assistance program</li> <li>&gt; EFC considerations incorporated</li> </ul>	1	●	
4.1b. Establish a TOC Technical Assistance program for municipalities to: <ul style="list-style-type: none"> <li>&gt; Host convenings around a series of TOC topic areas</li> <li>&gt; Support TOC feasibility studies</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Establish TOC Technical Assistance Program</li> <li>&gt; EFC considerations incorporated</li> </ul>	1	●	
4.1c. Provide TOC Grant Writing services to support municipalities in advancing equitable TOCs in LA County.  *Utilize Equity Focus Communities (EFC) index to inform prioritization of program recipients.	<ul style="list-style-type: none"> <li># Annual grant writing assistance support provided</li> <li># Grants secured</li> <li># Grant dollars leveraged</li> <li># of TOC plans/programs in place</li> <li># of affordable housing units produced/preserved (as data is available)</li> </ul>	1		●
4.1d. Provide TOC Technical Assistance Program (TOC TAP) to support municipalities in advancing equitable TOCs in LA County.  *Utilize Equity Focus Communities (EFC) index to inform prioritization of program recipients.	<ul style="list-style-type: none"> <li># TOC TAP assistance provided</li> <li># of TOC plans/programs in place</li> <li># of affordable housing units produced/preserved (as data is available)</li> </ul>	2		●

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
4.1e. Organize TOC convenings for LA County municipal staff, elected officials and commissioners to facilitate an exchange of ideas around TOC topics and best practices, provide joint training opportunities in a time- and cost-effective manner and structure and deliver targeted TOC technical assistance around topics that include but are not limited to the Transit Supportive Planning Toolkit Communications and Messaging, Community Stabilization, Affordable Housing and similar Community Development activities.	# Convenings completed  # Municipalities that participated in convenings	1		●

## Strategy 4.2 Improve education, information and training around TOC issues and TOC supportive policies.

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
4.2a. Identify topics of community concern and develop educational resources that address concerns, using case studies/messaging guides that demonstrate the importance of TOC investments and/or TOC supportive policies.  Make educational resources available on Metro online portal.	# Informational resources developed and shared with community	Ongoing	●	

## Strategy 4.3 Support state and federal policy and funding legislation to advance TOC goals and outcomes.

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
4.3a. In conjunction with partners, identify state and federal and funding efforts that would provide municipal partners with substantial policy and/or funding support to implement equitable TOCs in LA County.	> Summary of items elevated for Board consideration	Ongoing		●
4.3b. As appropriate, engage the Metro Board to support policy and funding efforts that would provide municipal partners with substantial policy and/or funding support to implement TOCs.	> Summary of items elevated for Board consideration	Ongoing	●	

## Strategy 4.4 Collaboration with partners to leverage TOC Corridor Baseline Assessments to support TOC implementation in Measure M transit corridors.

ACTION	MEASURE	TIMELINE	LEAD	SUPPORT
4.4a. Support municipalities in realizing recommended strategies from TOC Corridor Baseline Assessments.	# Grant writing assistance provided to LA County municipalities  # Technical assistance provided  # of TOC plans/programs in place	2		●

## Strategy 4.5 Improve the accessibility of Metro resources and funding opportunity information for Metro partners.

ACTION	MEASURE	TIMELINE (YEARS)	LEAD	SUPPORT
4.5a. Work with the Grants Department, Policy and Programming, Strategic Financial Planning, OMB, Marketing, and others to develop a consolidated, user-friendly portal of Metro resources and funding opportunities.	> Launch Portal  > Measure traffic volumes	1	●	





# We will share our progress.

The *TOC Implementation Plan* includes actions and measures that will be carried out within the designated timeframes in the plan. Lessons learned, adjustments and progress will be reported through Semi-Annual Reports to ensure that Metro maintains an open communication loop with the various partners that are critical in realizing equitable TOCs in LA County.

## Plan Monitoring and Updates

This Implementation Plan is a living document that will evolve over time. Semi-Annual Reports will be prepared every six months to report on progress, lessons learned and adjustments to existing efforts and to provide a space to make other potential improvements to the plan. The plan itself is intended to be an actionable plan for direct focused and near-term actions. As such, the entire plan will be updated every five years.

Metro staff will prepare the Semi-Annual Reports to present detailed progress being made towards achieving the four initiatives, strategies and actions, as illustrated through applicable measures. Specific details will be provided identifying what is working well and where there are needed/ planned improvements related to implementation, including revised timelines.

Specific feedback from municipalities and stakeholders will also inform the contents of each report. Semi-Annual reporting will act as the core mechanism for near-and medium-term TOC Plan performance assessments. The five-year update is intended to be more comprehensive and is an opportunity to identify the need for deeper adjustments, continuity or a more substantial reformulation of Metro's approach to

implementing the policy.

## Conclusion

Metro is fully committed to pursuing a future where improved mobility and the resulting access to opportunity are a reality for all LA County residents.

Improved mobility translates into improved quality of life that gets people where they need to go faster, safer and with the ability to choose from various mobility options. Transit Oriented Communities are places that facilitate this by **maximizing equitable access to a multi-modal transit network as a key organizing principle of land use planning and holistic community development**. The TOC Policy and this plan outline the process that Metro will continue to pursue, in collaboration with others, to maximize the positive benefits of the transit system and support communities to prepare for potential unintended consequences of these investments.

Grounded in the Vision 2028 goals of **enhancing communities and lives through mobility and access to opportunity and transforming LA County through regional collaboration and national leadership**, the policy and this plan blaze a trail for Metro that transcends the traditional role of a transit agency and embarks upon a future that is grounded in equity, collaboration and partnership.

# Appendices

## Appendix 1: TOC Policy Goals and Implementation

This matrix summarizes how each *TOC Implementation Plan* action fulfills the *TOC Policy Goals*.

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## TOC Policy Goals and Implementation – Initiative 2

TOC IMPLEMENTATION ACTION	TOC POLICY GOALS				
	Increase transportation ridership and choice	Stabilize and enhance communities surrounding transit	Engage organizations, jurisdictions and the public	Distribute transit benefits to all communities surrounding transit	Capture value created by transit
2.1a. Affordable housing units in the Metro Joint Development	•	•	•	•	
2.1b. Evaluate Metro Joint Development Policy	•	•	•	•	
2.1c. First/Last Mile plans for Metro transit projects	•		•	•	
2.1d. First/Last Mile Plans Implementation	•		•	•	
2.1e. Measure M Active Transport Program (MAT Program) project	•		•	•	
2.1f. Support implementation of MAT Program projects	•		•	•	
2.1g. Funding opportunities for Transit to Parks Strategic Plan activities	•		•	•	
2.1h. Collaborate with LA County Parks & Rec on park and transit needs	•		•	•	
2.1i. Design Review for new Measure M stations	•				
2.1j. Deploy Metro Affordable Transit Connected Housing (MATCH) Program		•	•		
2.1k. Provide Technical Assistance around value capture to Measure M cities		•	•		•
2.1l. Summarize Lessons Learned from TOD Planning Grant Program	•	•	•	•	•
2.1m. Support TOD Planning Grant Program Grantees	•	•	•	•	•
2.1n. Support the retention of small businesses with loans that leverage partnerships		•	•		



## TOC Policy Goals and Implementation – Initiative 2 *(continued)*

TOC IMPLEMENTATION ACTION	TOC POLICY GOALS				
	Increase transportation ridership and choice	Stabilize and enhance communities surrounding transit	Engage organizations, jurisdictions and the public	Distribute transit benefits to all communities surrounding transit	Capture value created by transit
2.2a. Increase awareness of the existing programs and tools	•	•	•	•	
2.2b. Update Transit Supportive Planning Toolkit	•	•	•	•	

## TOC Policy Goals and Implementation – Initiative 3

TOC IMPLEMENTATION ACTION	TOC POLICY GOALS				
	Increase transportation ridership and choice	Stabilize and enhance communities surrounding transit	Engage organizations, jurisdictions and the public	Distribute transit benefits to all communities surrounding transit	Capture value created by transit
3.1a. Opportunity sites for Joint Development	•	•	•	•	
3.1b. TOC Goals & tasks into scopes of work for corridor delivery process	•			•	
3.1c. Develop process for delivering the TOC Baselines Assessments	•	•	•	•	
3.2a. Develop an equitable, agency wide CBO Partnering Strategy			•		
3.3a. Train Metro staff on TOC Policy goals			•		
3.3b. Equity Platform integration		•			

## TOC Policy Goals and Implementation – Initiative 4

TOC IMPLEMENTATION ACTION	TOC POLICY GOALS				
	Increase transportation ridership and choice	Stabilize and enhance communities surrounding transit	Engage organizations, jurisdictions and the public	Distribute transit benefits to all communities surrounding transit	Capture value created by transit
4.1a. Establish a TOC grant writing assistance	•	•	•	•	•
4.1b. Establish a TOC Technical Assistance program (TOC TAP)	•	•	•	•	•
4.1c. Provide TOC Grant Writing services	•	•	•	•	•
4.1d. Provide TOC TAP services	•	•	•	•	•
4.1e. Organize TOC convenings for LA County municipal staff, elected officials and commissioners	•	•	•	•	•
4.2a. Develop educational resources that demonstrate the importance of TOC investments and/or TOC supportive policies	•	•	•		
4.3a. Identify TOC-related policy and funding effort	•	•	•	•	•
4.3b. As appropriate, engage the Metro Board on TOC-related policy	•	•	•	•	•
4.4a. Support municipalities in realizing TOC Corridor Baselines	•	•	•	•	•
4.5a. Develop a consolidated, user-friendly portal of Metro resources & funding opportunities			•		

## **Appendix 2: TOC Corridor Baseline Assessment Framework**

As noted in the TOC Implementation Plan, the TOC Corridor Baseline Assessments will be informed by collaboration with local jurisdictions and local community input and a three-part process that includes data assessment with community listening, policy inventory and a series of recommended strategies for municipalities.

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The data and policy assessments are described below:

The **Data Assessment** will be grounded in the TOC Policy Goals and Sub-goals and will include factors that are understood to play a role in transit ridership. The rationale for each factor is included in the table. Note – this is in addition to the EFCs, which are defined by race, income and zero-vehicle household:

> Key community socioeconomic vulnerabilities, such as the prevalence of low-income households, limited English-proficiency, zero vehicle households, low educational attainment, housing and transportation cost burden and similar factors.

- > Mobility trends such as transit ridership, options and frequencies, mode share, vehicle ownership and injuries and deaths from collisions.
- > Land uses that can enhance or hinder transit use and safe multi-modal mobility, including zoning, walkability (walkscore), space dedicated to parking, access to community assets that enhance healthy living (affordable housing, grocery stores, daycare centers, health centers, parks, open space and recreational facilities, schools, employment centers, and similar) and tree canopy/urban heat exposure.
- > Economic and real estate factors that can inform strategies for joint development and value capture, including land costs, commercial rents and vacant and underutilized properties.

### Example Demographic Data Factors

FACTOR	RATIONALE
Median Household (HH) Income Distribution	HH income is closely linked to both transit ridership and car ownership
Ethnicity	Historically, Metro's public transit ridership profile is heavily oriented towards non-white populations
Car Ownership Distribution	Zero-car and car-lite households ride public transit at higher rates
Population Density/Household Size/Dwelling Units	Key variable in public transit ridership, ridership potential and understanding of displacement potential
Employment in Place	Can illustrate existing commute patterns and commute distance
Housing Tenure Distribution	Provides a profile of the preponderance of renter versus owner households
Age Distribution	Can illuminate an age profile of different populations and public service needs
Crash Rate/Collision Factors for Pedestrians and Cyclists	Identification of hot spots/corridors that would benefit from First/Last Mile investments
College Educated Population Change Over Time	Education change can be a signal of market changes in an area
Housing Cost-burden Change Over Time and Housing and Transportation Cost-burden Over Time	Demonstration of market pressure on an area



The **Policies and Plans Assessment** would be utilized to take a snapshot of the policies, plans and key attributes, in existence within jurisdictions and around stations along transit corridors. It will provide a greater understanding of the types of TOC supportive steps jurisdiction have in place at the time of the assessment. It is assumed that this assessment/snapshot would be completed with input from the jurisdictions.

The Policies and Plans Assessment includes the following:

- > **TOC Policy Goals:** As with the larger implementation plan, the five TOC Policy goals are the organizing variables in the matrix and its contents
- > **Policy Goal Subtopic Areas:** Because the TOC Policy Goals are cross-cutting, the Subtopic areas have been included as an additional organizing element
- > **Assessment:** Policies and plans that are currently in place at the time of the assessment
- > **Policy/Plan Definitions and Characteristics:** General description of the policy/plan and the geographies in which they typically apply:
  - Jurisdiction-wide: Covers an entire jurisdiction with no variability or focus areas that are treated differently
  - Jurisdiction with focus areas: Treats specific areas within the jurisdiction differently. This could include different standards, zoning, projects, etc.
- > **Attributes:** A list of questions and characteristics to be examined as part of the assessment, ranging from binary to more detailed, qualitative responses

## Goal 1: Increase Transportation Ridership and Choice

### Policy and Plans Assessment

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>First/Last Mile (FLM)</b>	<ul style="list-style-type: none"> <li>&gt; Active transportation plan</li> <li>&gt; Bicycle master plan</li> <li>&gt; Pedestrian master plan</li> <li>&gt; Vision Zero</li> <li>&gt; Micromobility/shared mobility plan/policy</li> </ul>	These plans include strategies to ensure better options for biking, walking and/or transit access. Active transportation, bicycle and pedestrian plans are typically jurisdiction wide while mobility plans may focus on specific areas.	<ul style="list-style-type: none"> <li>&gt; Yes/No, indicate which</li> <li>&gt; Date of last update completed</li> <li>&gt; What priority projects does it identify in the station areas? 0.5-mile walkshed 1.5-mile bikeshed 3-mile bikeshed</li> <li>&gt; Time frame for next update</li> <li>&gt; Date adopted</li> </ul>
<b>Transportation Demand Management (TDM)</b>	TDM ordinance	These include strategies to encourage mode shifts away from Single Occupancy Vehicles and often involve a combination of incentives and requirements, such as transit passes, subsidies, developer provided infrastructure improvements, etc.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Employment/residential thresholds included</li> <li>&gt; Does it require or incentivize new development/redevelopment to include active transportation amenities?</li> <li>&gt; Does it require or incentivize businesses above the thresholds to offer transit and/or active transportation incentives/subsidies?</li> <li>&gt; Date adopted</li> </ul>

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Transportation Demand Management (TDM)</b> <i>(cont.)</i>	Transit supportive parking policies in station areas	Can include a broad range of policies, such as reduced or eliminated parking minimums for developments, establishment of parking maximums, demand-based pricing, shared parking, etc.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Includes reduced parking minimums?</li> <li>&gt; Includes parking maximums?</li> <li>&gt; Includes parking pricing?</li> <li>&gt; Unbundled parking</li> <li>&gt; Includes transit pass/ subsidy incentives/ requirements?</li> <li>&gt; Requires active transportation amenities</li> <li>&gt; Date completed</li> </ul>
<b>Transit Supportive Planning</b>	General Plan Mobility/ Circulation Element	State law requires the inclusion of this element. Typically includes sets of policies, street classifications, etc. More recently adopted/updated general plans incorporate complete streets policies and approaches into the mobility/ circulation element.	<ul style="list-style-type: none"> <li>&gt; Does this element include complete streets or other policies that support active transportation improvements? (Yes/No)</li> <li>&gt; Does the city's functional street classification system include features that support pedestrian and transit in balance with cars?</li> <li>&gt; Are the street classifications within station areas supportive of FLM access? <ul style="list-style-type: none"> <li>0.5-mile walkshed</li> <li>1.5-mile bikeshed</li> <li>3-mile bikeshed</li> </ul> </li> <li>&gt; Time frame for next update</li> <li>&gt; Date adopted</li> </ul>

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Transit Supportive Planning</b> (cont.)	Complete Streets Policy/Plan/ Resolution (if not included in the General Plan)	Some cities may not have complete streets policies in their General Plans if they have not recently completed a comprehensive general plan update or updated the Mobility/Circulation Element	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Does the policy/plan/ resolution include streets identified for “complete streets” treatment that serve as FLM feeder streets, or does the city need to reorient its priorities to make better connections to existing or proposed transit stop/ stations?</li> <li>&gt; Date adopted</li> </ul>
	Land Use Element	Provides general direction and guidance for physical development	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Does the policy/plan/ resolution prioritize complete neighborhoods, livability, placemaking, density near transit, afford- able housing production near existing and proposed transit stations/stations?</li> <li>&gt; Date adopted</li> </ul>
	Housing Element	Establishes goals and policies for housing within the General Plan. Must be updated every five to eight years and establish the jurisdictional capacity for housing overall and within areas of the city.	<ul style="list-style-type: none"> <li>&gt; What is the date of the last certified Housing Element?</li> <li>&gt; What housing densities are permitted within 0.5 miles of transit stations?</li> <li>&gt; When is the next planned update?</li> <li>&gt; Is the city filing the required Annual Reports?</li> </ul>



POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
Transit Supportive Planning (cont.)	Specific Plans or station area plans, or overlay zones and general zoning designed to be transit supportive within 0.5 miles of station(s)	Designed to implement General Plan goals and policies. May be general and include only broad policy constructs or may be very specific and govern every facet of development, urban design, placemaking, livability and land form.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Specific Plans or station area plans in place (this would include frameworks)</li> <li>&gt; Allowed mix of uses</li> <li>&gt; What densities are permitted?</li> <li>&gt; DUs p/acre; FAR</li> <li>&gt; What parking minimums/maximums are in place?</li> <li>&gt; Do existing and/or proposed block sizes and street design support walkability and transit access?</li> <li>&gt; Date adopted</li> </ul>
	Climate Action Plans	Establishes a roadmap to reduce GHG emissions in alignment with state climate policies. Typically contain a number of transportation/mobility measures that support increased modal shift towards transit, biking and walking.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; TOD, transit, active transportation actions/measures included</li> <li>&gt; Date adopted</li> </ul>

## Goal 2: Stabilize and Enhance Communities Surrounding Transit

### Policy and Plans Assessment

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
Housing	Inclusionary housing policy	Inclusionary zoning programs vary in their structure; they can be mandatory or voluntary and have different set-aside requirements, affordability levels and control periods. Most inclusionary zoning programs offer developers incentives, such as density bonuses, expedited approval and fee waivers.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the affordability requirements?</li> <li>&gt; What incentives/requirements are included?</li> <li>&gt; Date adopted</li> </ul>
	Rent control or rent stabilization	Rent control ordinances protect tenants from excessive rent increases. Such ordinances limit rent increase to certain percentages, but California state law allows landlords to raise rents to the market rate once the unit becomes vacant.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics/requirements of the policy(ies)?</li> <li>&gt; Date adopted</li> </ul>
	Just cause eviction ordinance	Just cause eviction statutes are laws that allow tenants to be evicted only for specific reasons. These “just causes” can include a failure to pay rent or violation of the lease terms.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics/requirements of the policy?</li> <li>&gt; Date adopted</li> </ul>
	First Right of Return (ROR) Ordinance and/or relocation assistance	ROR provides tenants the first right of return after housing repairs/redevelopment, generally at the same or approximately the same rent. Typically jurisdiction-wide policy. Relocation requires assistance to renters if certain triggers are met, such as no-cause eviction.	<ul style="list-style-type: none"> <li>&gt; ROR, Yes/No</li> <li>&gt; ROR, what are the characteristics of the policy?</li> <li>&gt; Date adopted</li> <li>&gt; Relocation, Yes/No</li> <li>&gt; Relocation, what are the characteristics of the policy?</li> <li>&gt; Date adopted</li> </ul>

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Housing</b> (cont.)	Density Bonus ordinances that expand on state requirements	Provides an increase in allowed dwelling units per acre (DU/A), Floor Area Ratio (FAR) or height. Can be linked to a variety of actions, such as covenanted affordable housing, reduced parking, etc. Can be jurisdiction-wide or focused on subareas.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy or ordinance?</li> <li>&gt; Date adopted</li> </ul>
	Commercial linkage fee	Commercial linkage fees are charged to developers of new office or retail properties and used to fund the development of affordable housing. Can be jurisdiction-wide or focused on subareas.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy?</li> <li>&gt; Date adopted</li> </ul>
	Affordable housing linkage fee	Generally, places a fee on certain market-rate units to ensure the production/preservation of affordable housing	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy?</li> <li>&gt; Date adopted</li> </ul>
	Condominium conversion restrictions	Prevents or restricts conversion of rental units to condominiums. Typically, jurisdiction-wide policy.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy?</li> <li>&gt; Date adopted</li> </ul>
	Municipal foreclosure assistance	Provision of funding to forestall foreclosure	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy or program?</li> <li>&gt; Does the city do this or work through a separate entity?</li> <li>&gt; Date adopted</li> </ul>

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Housing</b> ( <i>cont.</i> )	SRO (Single-Room Occupancy) Programs	Any ordinance that helps to preserve or allow new properties with single room occupancies, also called residential hotels	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy or program?</li> <li>&gt; Date adopted</li> </ul>
	Surplus Land for Affordable Housing	Does the city have policies and/or procedures in place that align with the Surplus Land Act as amended in 2019 that prioritizes surplus land for affordable housing?	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the policy?</li> <li>&gt; Does the jurisdiction have an inventory of surplus land and make reports to HCD?</li> <li>&gt; Date adopted</li> </ul>
	Land Banking for Affordable Housing Program	Land Banking for Affordable Housing Program allows local jurisdictions to develop a strategy to acquire property to support the development of affordable housing. Program characteristics include an inventory of the existing affordable housing stock, identification of opportunity sites that can be leveraged for affordable housing, and in some cases, the creation of a community land trust.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the program?</li> <li>&gt; Date adopted</li> </ul>
	Affirmatively Furthering Fair Housing Plan	A housing plan that aims to advance fair housing to overcome patterns of segregation, promote fair housing choice and inclusive communities.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; What are the characteristics of the program?</li> <li>&gt; Date adopted</li> </ul>



POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Business/Workforce</b>	Presence of Municipal Economic Development or Workforce Development Department or programs or similar entities that focus on small business/workforce	Entities may have formal or informal relationships with a jurisdiction and ability to support/carry-out small business/workforce development	> Yes/No  > Is there a formal relationship with the jurisdiction?
	Small business support programs/policies	May include a variety of programs/policies that can include direct subsidies, technical assistance, or other efforts	> Yes/No  > Program/policy details  > Date adopted
<b>Sustainability</b>	> Low Impact Development (LID) standards  > Green Streets standards		> Yes/No  > Program/policy details  > Date adopted
<b>Public Health</b>	Health and wellness plans or Policies	Does the entity have a General Plan and/or other policies in place that promote public health and wellness by targeting upstream interventions (environmental conditions that exist outside of an individual's control that affect opportunities for health and wellbeing, such as access to healthful food, parks and open spaces, environmental justice (including air quality), public safety, and similar?	> Yes/No  > Program/policy details  > Date adopted

## Goal 3: Engage Organizations, Jurisdictions and the Public

### Policy and Plans Assessment

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
<b>Civic Engagement</b>	Public Participation Plan	> Provide frameworks for engaging the public/ stakeholders to inform projects, policies and plans  > Provide frameworks for engaging CBOs in formal relationships	> Yes/No  > Program/policy details  > Date adopted

## Goal 4: Distribute Transit Benefits to All

### Policy and Plans Assessment

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
Equity	Equity Policies	Some jurisdictions have strategic plans that include equity policies and/or methodologies for evaluating projects through an equity lens. Typically, jurisdiction-wide but will identify geographic areas where equity merits special attention.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Does the jurisdiction have a strategic plan or framework as it relates to equity and/or processes to incorporate equity into its planning processes?</li> <li>&gt; Does the jurisdiction define mobility as it relates to equity and/or have processes to incorporate equity into transportation/mobility planning?</li> <li>&gt; Does the city/county have any community benefits requirements?</li> <li>&gt; Date adopted</li> </ul>
	Community Benefits Framework/Equity Screen	Community Benefits/Equity Screen allow for corridor communities to capture the value created by the public sector investment (transit) and develop a corridor-level community benefits strategy grounded in on the ground equity priorities	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; Does the jurisdiction or do the corridor communities have a Community Benefits/Equity Screen?</li> <li>&gt; What is included in the community benefits menu, if any?</li> <li>&gt; Date adopted</li> </ul>

## Goal 5: Capture Value Created by Transit

### Policy and Plans Assessment

POLICY GOAL SUBTOPIC AREAS	ASSESSMENT (POLICIES AND PLANS IN PLACE)	DEFINITIONS AND CHARACTERISTICS	ATTRIBUTES
Capture Value	<ul style="list-style-type: none"> <li>&gt; Assessment districts</li> <li>&gt; Tax Increment Financing (TIF) district</li> </ul>	Value capture mechanisms that are frequently utilized to make local improvements, such as streetscapes, FLM improvements, affordable housing, etc.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; If yes, provide details i.e. what kind of district</li> <li>&gt; If no, is this something that has been or is being considered?</li> </ul>
	<ul style="list-style-type: none"> <li>&gt; Impact fees</li> <li>&gt; Does the city have an impact fee program, and if so, do any of the projects in the fee program, provide for improvements that could help with station accessibility?</li> </ul>	Impact fees provide a means to fund the “fair-share” of improvements from development. May vary within a jurisdiction and include a range of transportation investments.	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; If yes, provide details</li> <li>&gt; If no, is this something that has been or is being considered?</li> </ul>
	<ul style="list-style-type: none"> <li>&gt; Community Benefits District</li> <li>&gt; Does the jurisdiction have any Community Benefits Districts in place (such as Business Improvement Districts)?</li> </ul>	Community Benefit Districts are districts that are created to provide improvements and other benefits within a jurisdiction. These districts typically materialize through a business improvement district (BID).	<ul style="list-style-type: none"> <li>&gt; Yes/No</li> <li>&gt; If yes, provide details</li> <li>&gt; If no, is this something that has been or is being considered?</li> </ul>







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Los Angeles County  
Metropolitan Transportation Authority

**Los Angeles County Metropolitan  
Transportation Authority**

**Transit Oriented Communities**

**Grant Writing Assistance and  
Technical Assistance Program Guidelines**

## I. TOC POLICY BACKGROUND

### TOC POLICY

In 2018, the Metro Board approved the Transit Oriented Communities Policy (TOC Policy) which affirmed Metro's commitment to incorporate equity, community development and land use considerations in how Metro plans and delivers the public transportation system in Los Angeles County.

The TOC Policy did the following:

**1. Defined the concept of TOCs for Metro and develop the goals and objectives of Metro's approach to enabling TOCs.**

Transit Oriented Communities (TOCs) are places (such as corridors or neighborhoods) that, by their design, allow people to drive less and access transit more. A TOC maximizes equitable access to a multi-modal transit network as a key organizing principle of land use planning and holistic community development. TOCs differ from Transit Oriented Development (TOD) in that a TOD is a specific building or development project that is fundamentally shaped by close proximity to transit.

TOCs promote equity and sustainable living in a diversity of community contexts by: (a) offering a mix of uses that support transit ridership of all income levels (e.g. housing, jobs, retail, services and recreation); (b) ensuring appropriate building densities, parking policies, and urban design that support accessible neighborhoods connected by multi-modal transit; (c) elevating vulnerable users and their safety in design; and (d) ensuring that transit related investments provide equitable benefits that serve local, disadvantaged and underrepresented communities.

**2. Defined "TOC Activities" that will be considered a "transportation purpose" and thus are eligible activities for funding under the Measure M guidelines, through Local Return (see Section 3).**

**3. Established a set of criteria to determine which TOC Activities Metro will fund and implement directly and which activities Metro will allow, enable, and incentivize local partners to fund and implement.**

The TOC Grant Writing and TOC Technical Assistance Programs further described in these guidelines are programs that Metro has developed to enable and incentivize Los Angeles County jurisdictions to implement TOC Activities.

The TOC Policy establishes the following five goals:

**1. Increase transportation ridership and choice**

- *Ridership:* Increase system ridership and promote usage of alternate, non-motorized, modes of transportation.
- *Transportation Options:* Leverage land use and urban design to encourage non-single occupant vehicle transportation options both on and off Metro property, through enhanced first/last mile options, travel demand management, and seamless transit connectivity.

- *Safety*: Work to reduce collisions and create welcoming environments for all ages, abilities and protected classes in the planning, construction, and operation of transit-oriented community projects.
2. Stabilize and enhance communities surrounding transit
    - *Housing Affordability*: Prioritize development and preservation of transit-adjacent Affordable Housing.
    - *Neighborhood Stabilization*: Protect and support local residents and businesses from displacement.
    - *Sustainability*: Ensure that infrastructure investments are multi-beneficial, improving access to transit and enhancing communities' environmental resilience.
    - *Economic Vitality*: Promote sustained economic vitality directly benefiting existing communities.
  3. Engage organizations, jurisdictions, and the public
    - *Community Engagement*: Ensure that stakeholders across a broad spectrum, including those that are harder to reach through traditional outreach strategies, are meaningfully engaged in the planning, construction, and operation of Metro's transit system.
    - *Foster Partnerships*: Through planning, coordination, policy advocacy and funding, foster relationships and partnerships with local residents and businesses, labor, municipal and institutional entities, community-based organizations, workforce development providers, the private sector, and philanthropy, to realize TOC goals.
  4. Distribute transit benefits to all
    - *Equitable Outcomes*: Ensure transportation investments and planning processes consider local cultural and historical contexts and improve social, economic, health, and safety outcomes that serve and benefit local, disadvantaged, and underrepresented communities.
    - *Complete Communities*: Promote and realize complete communities that support a mix of incomes, land uses, transportation choices, and equitable access to safe, sustainable, and healthy living.
    - *Small Business*: Encourage the utilization of Small Businesses in the contracting opportunities generated by Metro's investments.
  5. Capture value created by transit
    - *Value Capture*: Capture increased value of properties surrounding Metro's transit investments and re-invest that value into TOC Activities.

## II. TOC IMPLEMENTATION PLAN

The TOC Implementation Plan (TOC Plan) established a series of initiatives and strategies that Metro will pursue directly or as a partner to realize equitable TOCs across the County. Two of those strategies include the TOC Grant Writing Assistance and TOC Technical Assistance Programs (TAP), described in greater detail below.

Metro will prepare TOC Corridor Baseline Assessments (Baselines) for all Metro transit corridors, starting with Measure M transit corridors. The Baselines will include a community snapshot and opportunities to leverage the positive benefits of the transit investments as well as strategies to guard against potential unintended consequences, especially within vulnerable communities. Jurisdictions for which Baselines have been prepared will be expected to utilize the TOC TAP and TOC Grant Writing assistance to carry out the TOC strategies recommended in the Baseline.

Jurisdictions for which a Baseline has not yet been prepared will have access to the TOC TAP and TOC Grant Writing program if they are seeking to carry out one or more of the following TOC activities:

- Affordable Housing Production, Preservation, and Tenant Protections
- Community Stabilization (including anti-displacement strategies-housing and small businesses)
- Regional Housing Needs Assessment (RHNA) compliance activities, aligned with TOC Policy Goals
- First/Last Mile, Metro Active Transport (MAT), and Transit to Parks Strategic Plan project implementation (for MAT, scope items that extend beyond MAT funding allocations).

## EQUITY

Metro has defined equity as both an outcome and a process to address racial, socioeconomic, and gender disparities, to ensure fair and just access – with respect to where you begin and your capacity to improve from that starting point – to opportunities, including jobs, housing, education, mobility options, and healthier communities. It is achieved when one's outcomes in life are not predetermined, in a statistical or experiential sense, on their racial, economic, or social identities.

It requires community-informed and needs-based provision, implementation, and impact of services, programs, and policies that reduce and ultimately prevent disparities.

Additionally, in 2019, the Metro Board of Directors approved Equity Focus Communities (EFCs) as a tool for Metro to utilize in programs and plans to help identify areas of need. EFCs are defined as census tracts where:

- At least 40% of households are low-income (\$35,000 or less), and
- At least 80% are households of color, or
- At least 10% of households have zero cars

Through the TOC Plan and the resulting TOC Grant Writing and Technical Assistance Programs, Metro calls on Program Recipients to incorporate equity as a process and an outcome in funding requests. Additionally, Metro will prioritize resources in EFCs<sup>1</sup>.

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<sup>1</sup> Metro will prioritize resources in EFCs and other high-need communities, based on socio-economic factors, as deemed relevant.



## TOC GRANT WRITING ASSISTANCE

The TOC Grant Writing Assistance Program will be available to municipalities that seek to apply for grants to implement TOC Activities as defined in the Policy. Metro will make grant writers available to Los Angeles County municipalities that seek to implement TOC Activities in their communities, prioritizing EFCs.

## TOC TECHNICAL ASSISTANCE

TOC Technical Assistance Program (TOC TAP) will support local municipalities, prioritizing Los Angeles County's EFCs, in building local capacity and securing funding to realize equitable TOCs.

The TOC TAP will make professional services available for municipalities to build staff capacity in TOC areas and/or explore the feasibility of implementing TOC programs through market studies, transportation or land use studies (including affordable housing and community stabilization), utility studies that can evaluate needed utility upgrades that may be required to accommodate land use planning, environmental remediation studies, and similar.

### **III. ELIGIBLE APPLICANTS AND ACTIVITIES**

Eligible applicants for Grant Writing and Technical Assistance include Los Angeles County jurisdictions with land use authority with exceptions noted below.

For the MAT component, cities, County of Los Angeles, Caltrans, State and Federal agencies, and transit agencies are eligible to receive funding through this program. Other transportation-related public joint powers authorities (JPAs) must be sponsored by one of the aforementioned public agencies for the MAT component. Additionally, eligible MAT scope items include those that extend beyond MAT funding allocations that a jurisdiction may have secured.

For the Transit to Parks component, cities, County of Los Angeles, transit agencies, and nonprofit organizations are eligible for the Grant Writing Assistance Program. Nonprofit organizations are eligible for grant writing assistance if the entity is eligible for the specific Transit to Parks-related grant for which grant writing assistance would be provided. Eligible Transit to Parks activities are defined in the Transit to Parks Strategic Plan.

The TOC Grant Writing Assistance Program will support eligible applicants pursuing planning or capital grants and the Technical Assistance Program will support planning activities (not capital projects). Eligible TOC Activities for which TOC Grant Writing Assistance and TOC Technical Assistance Program funding can be requested include the following:

#### **General activities**

- Community engagement that targets harder-to-reach communities around/regarding TOC Activities or transit
- Events or programs that promote multi-modal transit options
- Discounted transit passes
- Grants and/or technical assistance to support projects and programs that achieve TOC goals
- Transportation related workforce training and education

### **Within 3-miles of a Major Transit Stop<sup>2</sup>**

- First/last mile improvements
- Complete Streets
- Land use planning that promotes TOC goals.
- Value capture studies and formation activities that support investment in TOCs. A value capture district must include at least one Major Transit Stop but may span a broader radius around that Major Transit Stop

### **Within half-mile of a Major Transit Stop**

- Public improvements that create stronger and safer connections to transit and improve the transit rider experience recognizing vulnerable users and their safety in design.
- Affordable Housing: Programs that produce, preserve, and protect affordable housing through:
  - Preservation or development of Affordable Housing units.
  - Innovative anti-displacement strategies to protect and retain Low-income Households.
- Small Business preservation: Programs that support and protect Small Businesses.
- Neighborhood-serving Amenities: Programs that preserve, protect, and/or produce Neighborhood-serving Amenities.

## **IV. EVALUATION CRITERIA**

1. TOC Policy Goal Alignment.
  - Does the proposed project align with the TOC Policy goals?
  - What is the TOC-need that the project will address?
2. Equity Focus Communities.
  - Is the proposed project in an EFC?
  - If not, is the proposed project in a high-need area as defined by another equity-based methodology? If so, which one?
3. Is the proposed project implementing a Baseline recommendation or is it advancing one or more of the following TOC priorities?

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<sup>2</sup> Major Transit Stop, per California Public Resource Code 21064.3, which may be amended from time-to-time, is defined as:

(a) An existing rail or bus rapid transit station (PRC 21060.2).

(b) A ferry terminal served by either a bus or rail transit service.

(c) The intersection of two or more major bus routes with a frequency of service interval of 15 minutes or less during the morning and afternoon peak commute periods.

Per the intent of the TOC Policy, Major Transit Stop shall also include an environmentally-cleared fixed-guideway transit station. A planned fixed-guideway station may also be considered if its location is the only alternative under consideration for a transit corridor in the planning stages.

- Affordable Housing Production, Preservation, and Tenant Protections
  - Community Stabilization (including anti-displacement strategies-housing and small businesses assistance)
  - Regional Housing Needs Assessment (RHNA) compliance activities, aligned with TOC Policy Goals
  - First/Last Mile, MAT project implementation, or Transit to Parks Strategic Plan
4. Equity as an Outcome.
- What community disparities will the project help reduce or eliminate?
  - How will the project specifically benefit marginalized, vulnerable, and/or underrepresented groups in the community?
  - How will the project reduce negative impacts for marginalized, vulnerable, and/or underrepresented groups in the community?
5. Staffing Commitment and Demonstrated Past Performance.
- Does the applicant have the staffing commitment to manage and deliver the project?
  - Does the applicant have a successful performance history on prior grants and/or similar efforts?
6. Equity as a Process: Demonstrated commitment to inclusive and meaningful stakeholder engagement.
- How have stakeholders been engaged to-date?
  - Who has been engaged?
  - How will stakeholders be engaged in the project implementation throughout the process?
  - How will the jurisdiction involve and engage residents who are historically underrepresented in land use planning and development processes?
  - How will the jurisdiction involve and engage residents who face community disparities identified above?
7. Transit Corridor Timing
- Description of the transit corridor project that will be associated with this effort and whether it is existing, planned, and/or environmentally cleared.

The following sections are only applicable to TOC TAP.

## **V. ELIGIBLE COSTS**

Applicants will develop and submit a budget as part of the application. Funds awarded will not exceed the budget submitted and may be less if the key objectives can be achieved at lower costs. Any cost overruns shall be the responsibility of the applicant. The grant can fund:

- Third party consulting costs directly providing services with respect to the project will be eligible for funding. Such eligible costs shall not include overtime costs.
- Costs associated with community outreach may include food, and non-cash incentives. Such proposed expenditures must be approved by Metro in advance of incurring costs.

## VI. NON-ELIGIBLE COST

Staff time and third party consultants and contracted staff costs for equipment, furniture, rental vehicles, mileage, food, office leases or space cost allocations.

Applicant staff overtime costs, mileage reimbursements, food and use of pool cars.

## VII. GENERAL AND ADMINISTRATIVE CONDITIONS

- a. **Duration of Grant Projects.** Projects' schedules must demonstrate that the projects can be completed, including related actions by the governing body (if any), within 36 months of award.
- b. **Funding Agreement.** Each awarded applicant must execute a Funding Agreement with Metro. The Funding Agreement will include the statement of work, including TOC objectives to be achieved, the budget reflecting grant amount and any local match, if applicable, as well as a schedule and deliverables. The schedule must demonstrate that the project will be completed within 36 months from the date of execution.
- c. **Funding Disbursements.** The Program is reimbursement-based. Funding will be disbursed on a quarterly basis subject to satisfactory compliance with the budget and schedule as demonstrated in a quarterly progress/expense report supported by a detailed invoice demonstrating the staff and hours charged to the project, any consultant hours, etc. An amount equal to 5% of each invoice will be retained until final completion of the project and audits. In addition, final scheduled payment will be withheld until the project is complete and approved by Metro and all audit requirements have been satisfied.

All quarterly reports will be due on the last day of the months of October, January, April, and July. Project expenditures that reach 75% of budget will be put on suspension when they are behind in submitting a series of quarterly reports and deliverables. Recipients are responsible for submitting on-time completed quarterly reports and invoices. Reports that are delayed or incomplete will result in payments being suspended until the work is on schedule and deliverables are provided according to the Scope of Work and Schedule.

- d. **Audits.** All program funding is subject to Metro audit. The findings of the audit are final. At the Senior Director's discretion, informal audits will be administered by the project staff.
- e. **Contract Management.** Program and contract management shall be administered by the Recipient staff. Recipient staff must clearly define roles of staff administration and management and may budget through the grant to hire contract staff to assist in managing the program. The contractor or consultant must be defined in the TOC TAP application and scope of work. Contractor or consultant staff shall not be associated with the hiring of consultants to perform the development of the work product.
- f. **Design Guidelines.** Program outreach activities will adhere to Metro's logo and design requirements and standards by clicking on the following link:  
[https://media.metro.net/projects\\_studies/tod/images/Metro Logo Guidelines.pdf](https://media.metro.net/projects_studies/tod/images/Metro_Logo_Guidelines.pdf)
- g. **Program Conditions.** Delivery of draft work products at significant milestones and quarterly project briefings will be coordinated with Metro staff.

- Grant recipients are required to share their proposed draft RFP, draft consultant contract and draft regulatory documents with Metro project staff prior to Recipient approval to ensure alignment with TOC Policy Goals.
- Recipient shall demonstrate that it can meet project milestones and stay within the budget identified in the Funding Agreement. If at the time Recipient has expended seventy-five percent (75%) of the Funds and Recipient has not demonstrated that the work is sufficiently complete consistent with Funding Agreement, LACMTA's Senior Director will notify Recipients Project Manager through written notice that payments will cease until a mutually agreed-to cost control plan is in place. In the case of insufficient Funds to complete the Project, no further payments will be made, and Recipient will identify and secure additional funds to complete the project identified in Attachment A.

## **VIII. DEOBLIGATION OF FUNDS.**

Grantee must demonstrate timely use of the funds and effective implementation of project scope of work by:

- i. Executing the Funding Agreement within sixty (60) days of receiving formal transmittal of the Agreement from LACMTA.
- ii. Meeting the Project milestone and deliverable due dates as stated in the Project Schedule and Budget, and Scope of Work.
- iii. Timely submitting of the Quarterly Progress/Expense Reports as defined in Part II, Section 2 of the Agreement and the Reporting and Expenditure Guidelines; and
- iv. Expending funds within thirty-six (36) months from the date the Funding Agreement is fully executed.
- v. Procuring contract/consultant to complete grant Scope of Work within six (6) months of agreement execution with LACMTA.
- vi. Notifying LACMTA as soon as grantee is aware of any changes and circumstances which alter the eligibility of the approved project.

In the event that timely use of funds and effective implementation of the project scope of work is not demonstrated, the Project will be reevaluated by LACMTA as part of its annual budget recertification of funds deobligation process and the Funds may be deobligated and reprogrammed to another project. Grantees will receive a letter by LACMTA notifying them of the opportunity to appeal. Grantees interested in presenting their appeal should reply to LACMTA's Senior Director.

Administrative extensions may be granted under the following conditions:

- i. Project delay due to an unforeseen and extraordinary circumstance beyond the control of the project sponsor (legal challenge, act of God, etc.).
- ii. Project delay due to an action that results in a change in scope of work or project schedule that is mutually agreed upon by LACMTA and the project sponsor prior to the extension request.
- iii. Project fails to meet completion milestone, however public action on the proposed regulatory change(s) has been scheduled and noticed to occur within 60 days of the scheduled completion milestone.
- iv. Administrative time extensions longer than 6 months will require a formal written



amendment of the grant agreement.

Informal administrative amendments may be granted under the following conditions:

- i. Project that requires a one-time 6-month time extension based on the Administrative extensions conditions noted above may be eligible for an informal administrative approval. Informal administrative approval will be provided via a signed letter from Metro Senior Director. The Metro Senior Director must secure concurrence from the Senior Executive Officer.

Upon full execution of agreement, Recipient has committed to having the staffing necessary to fulfill the scope of the project. Therefore, inadequate staffing shall not be considered a basis for administrative extensions or appeal of deobligation of funds.

If Recipient does not complete an element of the Project, as described in the Scope of Work, due to all or a portion of the Funds lapsing, the entire Project may be subject to deobligation at LACMTA's sole discretion. If all the Funds are reprogrammed, the Project shall automatically terminate.



# Next stop: access to opportunity.

**Transit Oriented Communities (TOC) Implementation Plan**  
Legistar: 2020-0110

**Planning & Programming Committee**  
October 14, 2020

**REVISED**



# Recommendations

1. Approve the TOC Implementation Plan and TOC Grant Writing and Technical Assistance Program Guidelines; and
2. Authorize CEO or designee to enter into multiple agreements with Los Angeles County cities, County of Los Angeles, and other eligible entities to fund TOC Grant Writing and TOC Technical Assistance recommended in the TOC Implementation Plan in an aggregate amount not to exceed \$5M, subject to annual budget programming.

# Meeting the Moment

## > ***Mobility Transformation:***

- Measure M (2016)

## > ***Board Direction and Vision:***

- Vision 2028 Strategic Plan (2018)
- **TOC Policy** (2018)
- Equity Platform (2018)

## > ***Need/Urgency of core riders:***

- Affordable Housing, COVID-19, & Community Stabilization Crisis

## TOC Policy Goals

*Increase transportation ridership  
and choice*

*Stabilize and enhance communities  
surrounding transit*

*Engage organizations, jurisdictions,  
and the public*

*Distribute transit benefits to all*

*Capture value created by transit*

# Initiative 1: TOC Corridor Baseline Assessments

## TOC Corridor Baseline Assessment Process:

### *Jurisdiction Coordination/Stakeholder Engagement*

#### *TOC Data*

- > Demographic
- > Displacement Risk
- > Economic & Employment
- > Mobility
- > Collision Data
- > Housing



#### *TOC Policy Inventory/Assessment*

- > Land Use Plans
- > Affordable Housing
- > Anti-Displacement
- > Economic Development
- > Value Capture
- > Environmental



#### *TOC Strategy Recommendations*

For municipalities to leverage the transit infrastructure for equitable TOCs with Metro Partnership Opportunities



# Initiatives 2-4: Internal and External to Metro

## INITIATIVE 2: *Continually Improve TOC Program Areas*

2.1	Implement TOC Programs in alignment with Policy Goals	<b>16 actions, examples:</b> > Update Joint Development Policy > Develop F/L Mile Plans for Transit Corridors
2.2	Improve effectiveness of existing Programmatic Areas	

## INITIATIVE 3: *Enhance Internal Coordination*

3.1	Integrate TOC planning in Measure M corridor delivery	<b>6 actions, examples:</b> > Identify opportunity sites for development > Co-Develop CBO Partnering Strategy
3.2	Increase equitable partnership opportunities with CBOs	
3.3	Expand staff capacity and training in TOC areas	

## INITIATIVE 4: *Strengthen Coordination & Collaboration*

4.1	Improve technical capacity & increase funding for TOCs	<b>10 actions, examples:</b> > Develop educational resources > Develop a centralized, user-friendly portal of Metro resources and tools
4.2	Improve education, information, and training around TOCs	
4.3	Support policy and funding legislation that advances TOCs	
4.4	Collaborate to implement TOC Corridor Baselines	
4.5	Improve accessibility of Metro resources and funding	

# TOC Assistance Programs

## *TOC Grant Writing Assistance*

- > Metro to provide Grant Writers
- > *Near-term:* Affordable Housing, Community Stabilization, RHNA, F/L Mile, MAT, & Transit to Parks
- > *Long-term:* TOC Corridor Baseline Recommendations

- > Equity Criteria for prioritizing resources
- > Authorization to enter into agreements with local jurisdictions not to exceed \$5M, subject to annual budget programming

## *TOC Technical Assistance*

- > Host convenings
- > Up to \$200,000 for planning activities that support TOC activities
- > *Near-term:* Affordable Housing, RHNA, Community Stabilization, F/L Mile, MAT, & Transit to Parks
- > *Long-term:* TOC Corridor Baseline Recommendations

# Plan Monitoring and Updates

- > A living document that will allow for continual feedback, learning, and improvement
- > **Semi**-Annual Reports to the Board
  - Progress and Achievements
  - Adjustments and Refinements
- > Baselines to be updated 5 to **7**~~10~~ years
- > Comprehensive TOC Plan update at 5-year period