



TOD Policy

Citizen Advisory Committee
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Purpose of the TOD Policy

- Express Agency's goals and business objectives for joint development on its property
- Outline process and requirements for property disposition
- Identify Agency's role(s) in promoting TOD in station areas



Background and Context: Use of JPB Property





Background: Caltrain Properties

Caltrain's property holdings are unique

- Old system that started serving Peninsula in 1863
- Caltrain has a dynamic corridor
- Public agency purchased an existing system
 - ROW purchased by JPB in 1991
 - In 1980s, Southern Pacific already separated development parcels from ROW for Catellus
 - » Example: Catellus retained underlying fee in SF Yard
 - The amount of property purchased by the JPB was whittled down to correspond to available funds



Background: Caltrain Properties

Caltrain's property holdings are unique

- Stations were granted to the JPB by State in 1995
- The JPB's property holdings are more limited than other transit agencies, such as BART, which was built starting in the 1970s and through early 2000s.
 - BART's focus on car parking allowed them to purchase substantially more land around stations



Example of Millbrae Station: BART and Caltrain Station Property Holdings





Current Use of JPB Property

- Use of JPB property is principally dedicated to serving the agency's mission as a rail service provider
- “Railroad Uses” – use of property to support delivery of rail service
 - Infrastructure, equipment, and facilities necessary for delivering rail service, such as tracks, stations, access facilities, grade separations, signals, etc.
 - Railroad uses are not static: the railroad is continuing to grow



Current Use of JPB Property

- “Non-railroad uses” – ancillary uses of property that do not directly support delivery of rail service, but could provide source of revenue
- Two categories of non-railroad uses:
 - Public-serving uses proposed by third parties, such as utilities, streets, etc.
 - Commercial uses proposed by third parties, such as car sales lots, parking, storage, etc. as well as TOD projects



Current Use of JPB Property

- Non-railroad uses allowed on JPB property only if compatible with current and potential future agency needs and railroad uses of the property
 - Generally, leases required to be terminated if/when the property is needed for railroad uses
- Tension between preserving land for potential future railroad use and using land for longer-term non-railroad uses
 - One TOD project (Hayward Park) pursued after determination that it would not preclude future railroad uses



Future Use of JPB Property

- Many changes coming to Caltrain corridor in the future, which will affect future rail service and future use of JPB property:
 - Electrification of corridor
 - Expanded fleet and maintenance needs
 - Potential grade separation projects
 - Blended service with High Speed Rail
 - Other potential Caltrain infrastructure projects related to Business Plan Implementation



Belmont Station: Example of Balancing Tradeoffs with Future Use of JPB Property



Policies that Guide Use of JPB Property



Plans and Policy

- Caltrain Business Plan
- Rail Corridor Use Policy
- Transit-Oriented Development Policy



Caltrain Business Plan

- “How should Caltrain grow?”
- Key outcomes:
 - Long-range vision for Caltrain’s rail service, including:
 - Train service patterns
 - Conceptual infrastructure needs
 - Costs and outcomes of service delivery
 - Business case and strategy
 - Implementation plan



Rail Corridor Use Policy (RCUP)

- “How could the JPB’s land be used and who could use it?”
- “What property could be available for non-railroad uses, such as TOD projects?”
- Key outcomes:
 - Map and inventory of JPB real estate assets and potential capital projects
 - Policy document to guide review process for proposed uses on JPB property



Transit-Oriented Development Policy (TOD Policy)

- “How should the JPB develop land that is available for non-railroad uses?”
- Key outcomes:
 - Goals for TOD on JPB property
 - Refined list of potential opportunity sites for TOD projects
 - Business objectives associated with joint development
 - Policies for engaging with local planning efforts and promoting TOD in station areas



Relationships between the Efforts

- **Business Plan:**
 - Capital infrastructure requirements for the Business Plan's service vision are incorporated into the **RCUP**
- **Rail Corridor Use Policy:**
 - Data from the RCUP will inform **TOD Policy** development, including inventory of potential opportunity sites



PRELIMINARY FINDINGS FROM RCUP

The Rail Corridor Use Policy (RCUP) project performed a preliminary assessment of JPB sites to understand the remaining potential development opportunities after considering property needed to support the railroad's current and future needs.

PRELIMINARY

LOCATION	Acreage Remaining after Service Vision Capital Project Overlay	Note
Redwood City Station	1.7 acres	Irregularly shaped site includes transit center and creek
Mountain View Station	3.1 acres	Includes transit center and easement to VTA
Total	4.8 acres	



OTHER POTENTIAL OPPORTUNITY SITES

PRELIMINARY

Location	Acreage Remaining after Service Vision Capital Project Overlay	Note
Williams Ave & Diana St, San Francisco	1.4 acres	Site occupied with community garden and over tunnel
South San Francisco Station	1.3 acres	Most of the site is under 101 and it is not independently developable
San Mateo Station	1.1 acres	Subject to long term lease with City of San Mateo
2 nd Avenue, San Mateo	0.3 acres	Great location, very small site
Hillsdale Station	0.6 acres	Not independently developable
Menlo Park Station	1.2 acres	Very narrow, includes many parking spaces and is a historical station site
Sunnyvale Station	0.9 acres	Used as the station's primary access point, shuttle and parking

The TOD Policy



SCOPE OF THE TOD POLICY

- Applies to properties that are:
 - Owned by the Agency in fee simple
 - Available for development independent from a capital project (as identified by RCUP)



TOD POLICY GOALS

- **Sustainable Transportation.** Promote Caltrain ridership and sustainable transportation modes.
- **Value Creation.** Create value for the JPB, consistent with the JPB's overall business strategy, which can be reinvested into the railroad's core mission of providing rail transportation service.



TOD POLICY GOALS

- **Equity.** Provide an appropriate balance of land uses, equity in access, and other benefits that align with the priorities of the local community.
- **Complete Communities.** Establish station areas as complete communities in partnership with other stakeholders.



STRATEGIC OBJECTIVES

- **Encourage transit-supportive development**
- TOD should encourage transit ridership and enable daily activities that do not require a car.
- Parking for the TOD should be limited to discourage vehicle trips in favor of other modes, including walking, biking and transit.
- TOD should seek the maximum possible density
 - Shall include a minimum of 50 units per acre and all projects shall be at least 4 stories high.



STRATEGIC OBJECTIVES

- **Generate revenue streams to offset operating costs**
- Favor long-term ground leases
 - Sale of property may be considered in exceptional situations
- Receive fair market value for land.
- Participate in the success of development
 - Participation rents
 - Base rent floor



STRATEGIC OBJECTIVES

- **Generate revenue streams to offset operating costs**
 - **Solicit development proposals using a competitive process.**

Unsolicited offers considered only in special cases

For example: small site, limited access, or unable to be developed independently, a competitive process may not be available.



STRATEGIC OBJECTIVES

- **Require residential TOD to provide affordable housing onsite.**
- Residential development: 30 percent below market rents.
 - 10 percent targeted to households with incomes of no more than 120 percent of Area Median Income (AMI),
 - 10 percent: 80 percent of AMI
 - 10 percent: 50 percent of AMI.



STRATEGIC OBJECTIVES

- Encourage high labor standards and contribute to workforce development
- Require prevailing wage for labor.
- Encourage project labor agreements.

Questions?