



Western Riverside Council of Governments Planning Directors' Committee

AGENDA

**Thursday, October 12, 2017
2:00 p.m.**

**County Administrative Center
4080 Lemon Street
5th Floor, Conference Room C
Riverside, CA 92501**

Please Note Change Meeting Location & Time

In compliance with the Americans with Disabilities Act and Government Code Section 54954.2, if special assistance is needed to participate in the Planning Directors' Committee meeting, please contact WRCOG at (951) 955-8515. Notification of at least 48 hours prior to meeting time will assist staff in assuring that reasonable arrangements can be made to provide accessibility at the meeting. In compliance with Government Code Section 54957.5, agenda materials distributed within 72 hours prior to the meeting which are public records relating to an open session agenda item will be available for inspection by members of the public prior to the meeting at 4080 Lemon Street, 3rd Floor, Riverside, CA, 92501.

The Planning Directors' Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

- 1. CALL TO ORDER (Patty Nevins, Chair)**
- 2. SELF INTRODUCTIONS**
- 3. PUBLIC COMMENTS**

At this time members of the public can address the Planning Directors' Committee regarding any items with the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

- 4. CONSENT CALENDAR**

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

- A. **Summary Minutes from the August 10, 2017, Planning Directors' Committee Meeting are Available for Consideration.** **P. 1**

Requested Action: 1. *Approve Summary Minutes from the August 10, 2017, Planning Directors' Committee meeting.*

- B. **WRCOG Committees and Agency Activities Update** **Andrea Howard, WRCOG** **P. 5**

Requested Action: 1. *Receive and file.*

5. **REPORTS / DISCUSSION**

- A. **Senate Bill 1 – Climate Adaptation Grant Application** **Alexa Washburn, National Community Renaissance** **P. 9**

Requested Action: 1. *Receive and file.*

- B. **Bottom-Up Local Input Process for the 2020 Regional Transportation Plan / Sustainable Communities Strategy (RTP/SCS)** **Kimberly Clark, SCAG** **P. 11**

Requested Action: 1. *Receive and file.*

- C. **Regional Housing Needs Assessment (RHNA) Overview** **Ma'Ayn Johnson, SCAG** **P. 21**

Requested Action: 1. *Receive and file.*

- D. **Cannabis Regulatory Updates** **Cynthia Mejia, WRCOG** **P. 33**

Requested Action: 1. *Receive and file.*

- E. **Grant Writing Assistance Program** **Christopher Tzeng, WRCOG** **P. 35**

Requested Action: 1. *Receive and file.*

- F. **Transportation Uniform Mitigation Fee (TUMF) Calculation Handbook Update** **Daniel Ramirez-Cornejo, WRCOG** **P. 75**

Requested Action: 1. *Receive and file.*

6. **ITEMS FOR FUTURE AGENDAS** **Members**

Members are invited to suggest additional items to be brought forward for discussion at future Planning Directors' Committee meetings.

7. **GENERAL ANNOUNCEMENTS** **Members**

Members are invited to announce items/activities which may be of general interest to the Planning Directors' Committee.

8. **NEXT MEETING:** The next Planning Directors' Committee meeting is scheduled for Thursday, November 9, 2017, at 9:00 a.m. at a location to be announced.
9. **ADJOURNMENT**

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1. CALL TO ORDER

The meeting of the Planning Directors' Committee (PDC) was called to order at 9:07 a.m. by Vice-Chair Charissa Leach at the Tukwet Canyon Golf Club in Beaumont.

2. SELF INTRODUCTIONS

Members present:

Rebecca Deming, City of Beaumont
Cathy Perring, City of Eastvale
Mary Wright, City of Jurupa Valley
Cheryl Kitzerow, City of Menifee
Rick Sandzimier, City of Moreno Valley
Cynthia Kinser, City of Murrieta
Luke Watson, City of Temecula
Matt Bassi, City of Wildomar
Charissa Leach, County of Riverside (Vice-Chair)
Dan Fairbanks, March JPA
Kristin Warsinki, Riverside Transit Agency

Staff present:

Jennifer Ward, Director of Government Relations
Chris Gray, Director of Transportation
Tyler Masters, Program Manager
Cynthia Mejia, Staff Analyst
Anthony Segura, Staff Analyst

Guests present:

Shirley Medina, Riverside County Transportation Commission
Dr. Newman, Community Resident

3. PUBLIC COMMENTS

Dr. Newman spoke in opposition to the regional streetlight program.

4. CONSENT CALENDAR - (Bassi/Kinser) 11 yes; 0 no; 0 abstentions. Items 4.A through 4.C were approved by a unanimous vote of those members present. The Cities of Banning, Calimesa, Canyon Lake, Corona, Hemet, Lake Elsinore, Norco, Perris, Riverside, San Jacinto, and the Morongo Band of Mission Indians were not present.

A. Summary Minutes from the July 13, 2017, Planning Directors' Committee meeting were available for consideration.

Action: 1. *Approved Summary Minutes from the July 13, 2017, Planning Directors' Committee meeting.*

B. WRCOG Committees and Agency Activities Update

Action: 1. Received and filed.

C. Regional Streetlight Program Activities Update

Action: 1. Received and filed.

5. REPORTS / DISCUSSIONS

A. Senate Bill (SB) 1 Update

Shirley Medina with the Riverside County Transportation Commission (RCTC) provided an update on important funding application deadlines for SB 1. Ms. Medina encouraged member jurisdictions to keep a list of documents needed to apply for funding and emphasized the importance of including line items relating to what the funding would be utilized for. Ms. Medina further expressed that multimodal projects with environmental justice, public health and/or greenhouse gas reducing components will score higher on the funding scale.

Committee member Matt Bassi asked if the gas tax will go into effect in November.

Ms. Medina confirmed that, yes, the tax will go into effect in November.

Action: 1. Received and filed.

B. Assembly Bill (AB) 52: Tribal Consultation Requirements and Best Practices

Terrie Robinson, General Counsel for the Native American Heritage Commission, provided a thorough overview of the statutory California Environmental Quality Act (CEQA) requirements relating to cultural resources. Ms. Robinson also provided relevant feedback that can assist local planning departments with these requirements moving forward. Ms. Robinson offered to share sample letters with interested parties to facilitate meeting the requirements under AB 52. Because AB 52 contains highly confidential components in reporting documents, her office recommends protecting documents. Finally, Ms. Robinson reviewed the consultation requirements under AB 52 and identified best practices including sending more than one consultation notice and working with the tribe(s) to discuss mitigation measures for environmental documents.

Action: 1. Received and filed.

C. Assembly Bill (AB) 52: Tribal Perspective

Raymond Haute, Tribal Historic Preservation Officer for the Morongo Band of Mission Indians, emphasized that the technical advisory reports under CEQA may not address mitigation efforts that tribes find important, so it is crucial that local government(s) communicate with the local tribe(s) and have a meaningful consultation. A meaningful consultation to a tribe may signify receiving a phone call from the Lead Agency to ensure that a notification document was received and/or to extend an introduction. Mr. Haute stressed that tribes find cultural resources sacred and potential destruction of sacred resources can result in irreparable harm to the geographic area's history.

Action: 1. Received and filed.

D. Western Riverside Energy Partnership Activities Update

Anthony Segura, WRCOG Staff Analyst, reported that the Western Riverside Energy Partnership (WREP) is a collaboration between Southern California Edison (SCE), SoCal Gas and member jurisdictions to promote sustainable practices within jurisdictional facilities and local homes. WREP began in 2010 with 11 member jurisdictions throughout the subregion. This year, the partnership expanded to the Cities of Corona and Moreno Valley. One of the primary offerings of the WREP is the Direct Install provided by SCE that facilitates municipal energy efficient retrofits at no cost. Mr. Segura emphasized that there is still funding for projects and the availability remains at a first come first serve basis.

Committee member Mary Wright asked which municipal facilities are eligible for upgrades. Mr. Segura stated that only municipal facilities within the WREP partnership are eligible for the no-cost upgrades.

Committee member Cheryl Kitzerow asked if the municipal building must be owned by the jurisdiction.

Tyler Masters, WRCOG Program Manager, confirmed that the city does not need to own the building. A facility will qualify so long as it is leased by the municipality and under SCE's portfolio.

Mr. Segura added that SoCal Gas is exploring the option of developing its own direct install program as well.

Action: 1. *Received and filed.*

6. ITEMS FOR FUTURE AGENDAS

There were no items for future agendas.

7. GENERAL ANNOUNCEMENTS

Anthony Segura announced that the Energy and Environmental Programs Department will be hosting a tour of IceEnergy on Thursday, August 31, 2017, from 1:00 p.m. to 3:00 p.m. IceEnergy is an energy and cooling business located in the City of Riverside that provides cooling structures that can be installed in commercial, industrial or residential buildings in order to lower energy costs and decrease carbon emissions.

Mary Wright announced that she is running for Vice President of Marketing for the American Planning Association.

Jennifer Ward informed the Committee that the League of California Cities will be hosting a webinar on SB 1 on August 11, 2017.

8. NEXT MEETING: The next Planning Directors' Committee meeting is scheduled for Thursday, September 14, 2017; location to be announced.

9. ADJOURNMENT: The meeting of the Planning Directors' Committee adjourned at 10:47 a.m.

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Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: WRCOG Committees and Agency Activities Update

Contact: Andrea Howard, Senior Analyst, ahoward@wrcog.us, (951) 955-8515

Date: October 12, 2017

The purpose of this item is to update the Committee on noteworthy actions and discussions held in WRCOG's recent standing Committee meetings, and general WRCOG project updates.

Requested Action:

1. Receive and file.

Following is an update on items that have been discussed at recent WRCOG standing Committee meetings.

Regional Streetlights Program

At its October 2, 2017, meeting, WRCOG's Executive Committee authorized the Regional Streetlight Program to move forward by contracting with Siemens Industry, Inc., to retrofit streetlights to LEDs and provide ongoing operations and maintenance services. The contract is approximately \$5.9 million over five years. The Program is working to reduce costs and increase energy efficiency of Streetlights by acquiring 48,000 streetlights from Southern California Edison in eleven participating WRCOG member jurisdictions. The Program also increases local control and creates future Smart City opportunities.

Property Assessed Clean Energy (PACE) Programs

The Executive Committee approved the addition of Greenworks, which offers commercial PACE financing, and Ygrene, which offers both residential and commercial PACE financing, to operate in Western Riverside County under the WRCOG umbrella. These will roll out later this year, and if a jurisdiction desires NOT to include Greenworks and/or Ygrene as providers in their community, it must adopt an opt-out Resolution, available upon request.

Earlier this year, the Executive Committee approved two additional residential PACE Programs to operate under the WRCOG umbrella. The CaliforniaFIRST Program has launched and the Spruce PACE Program is anticipated to launch in fall 2017.

Community Choice Aggregation (CCA)

On August 7, 2017, the Executive Committee moved forward in the process of establishing a CCA by directing staff to hire two consulting firms – The Energy Authority and EES Consulting, who will help staff develop and launch the CCA – by approving a template Joint Powers Agreement (JPA) and template Bylaws for the CCA. Jurisdictions which ultimately decide to join the CCA can use these draft documents as a starting point and will later finalize a more formal governance structure and operating procedures. WRCOG staff are working with each jurisdiction that is interested in joining the CCA to provide additional details and answer all questions on how the CCA will operate and benefit residents.

To participate in the CCA, action is needed by the interested City Council, and jurisdictions can take this step at whatever timeframe is comfortable to them (a city is able to join the CCA at any time). The goal is to have a CCA fully operational by July 2018.

Feasibility Study to Explore EXPERIENCE Sustainability Demonstration Center

WRCOG's Executive Committee authorized an agreement with PlaceWorks consultants to examine the feasibility of implementing a regional demonstration center and activity hub in Western Riverside County to educate sustainable practices and showcase the leadership of the subregion. The center concept, "EXPERIENCE," seeks to provide a community asset that would offer many opportunities such as conference space, student education, communal gardens, recreation and entertainment, and interactive learning experiences for water, energy, and environmental efficiency. The feasibility study, anticipated to take 12 months, will incorporate input from member jurisdictions and partners, and analyze at least three potential sites to determine the market demand for the center's program elements, potential governance options and fundraising opportunities, and financial viability of this concept. At the next PDC meeting, staff will present the concept and upcoming analysis in more detail.

TUMF Program Activities Update

Staff are finalizing an updated Fee Calculation Handbook, which will include updated fee calculations, and a TUMF Reimbursement Manual, which will streamline the payment process and provide information on expenses eligible for reimbursement. Both of these documents will be brought forward through the WRCOG Committee structure for review and approval in late 2017.

WRCOG Used Oil Program Events

The following is a list of Used Oil and Oil Filter Exchange events that are currently scheduled for the upcoming months. To request an event for your jurisdiction please contact Kyle Rodriguez, WRCOG Staff Analyst, at (951) 955-8328 or krodriguez@wrcog.us.

Date	Event	Address	Time
11/4/2017	City of Temecula Used Oil Event	TBA	9 a.m. - 12 p.m.
11/18/2017	City of Riverside Used Oil Event	AutoZone, 4980 La Sierra Ave	9 a.m. - 1 p.m.
12/2/2017	City of Perris Used Oil Event	O'Reilly, 119 West Nuevo Rd.	9 a.m. - 12 p.m.
12/2/2017 (Pending)	City of Eastvale Winter Wonderland	Eastvale, TBA	TBA
12/16/2017	City of Eastvale Used Oil Event	AutoZone, 14228 Schleisman Rd.	9 a.m. - 12 p.m.

Upcoming WRCOG Meetings

Upcoming standing Committee meetings will take place on the dates listed below:

- **Administration & Finance Committee**
Next meeting: Wednesday, October 11, 2017, at 12:00 p.m.
- **Technical Advisory Committee**
Next meeting: Thursday, October 19, 2017, at 9:30 a.m.
- **Finance Directors' Committee**
Next meeting: Thursday, October 26, 2017, at 10:00 a.m.
- **Executive Committee**
Next meeting: Monday, November 6, 2017, at 2:00 p.m.

- **Public Works Committee**

Next meeting: Thursday, November 9, 2017, at 2:00 p.m.

Prior Action:

None.

Fiscal Impact:

This item is informational only; therefore there is no fiscal impact.

Attachment:

None.

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Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: Senate Bill 1 – Climate Adaptation Planning Grant

Contact: Alexa Washburn, National CORE Vice President of Planning, awashburn@nationalcore.org, (949) 394-7996

Date: October 12, 2017

The purpose of this item is to inform Committee members of a joint grant application staff will submit later this month with the San Bernardino County Transportation Authority (SBCTA), and to introduce the proposed outcomes of the grant and their potential applications to member agencies.

Requested Action:

1. Receive and file.

Background

Senate Bill (SB) 379 establishes new requirements for cities to include climate adaptation and resiliency language in their General Plans, typically within the Safety Element. The bill is triggered by updates to the Local Hazard Mitigation Plan (LHMP) on or after January 1, 2017, and otherwise required by all cities by no later than January 1, 2022.

In September 2017, Caltrans released the Grant Application Guides and call for applications for the new grant funding from SB 1, the Road Repair & Accountability Act of 2017. This funding includes \$20 million over three years for Adaptation Planning Grants to local and regional agencies for climate change adaptation planning.

Joint Application

WRCOG and SBCTA are developing a joint Caltrans Adaptation Planning Grant application. The Adaptation and Resiliency chapter of WRCOG's 2010 Subregional Climate Action Plan included a Vulnerability Assessment – a required component of local jurisdictions' compliance with SB 379. Building off of this assessment, the grant application will propose development of a Climate Adaptation and Resiliency Toolkit to include (1) a locally appropriate, Regional Template for Climate Adaptation and Resiliency Element; (2) a Green Streets Guidebook that will offer support to municipalities interested in planning, designing, and constructing green streets, which will complement and aid in implementing WRCOG's Alternative Compliance Program for stormwater management which is currently under development; and (3) a City Level Hazards and Evacuation Maps, which will account for vulnerable populations, including transit dependent communities.

The components of this Toolkit would help member jurisdictions comply with the requirements of SB 379 and would proactively address other climate related vulnerabilities of our region. The proposed Toolkit would be scheduled for completion by September 2019.

Prior Action:

None.

Fiscal Impact:

This item is informational; therefore there is no fiscal impact.

Attachment:

None.



Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: Bottom-Up Local Input Process for the 2020 Regional Transportation Plan / Sustainable Communities Strategy (RTP/SCS)

Contact: Kimberly Clark, SCAG Regional Planner Specialist, clark@scag.ca.gov, (213) 236-1844

Date: October 12, 2017

The purpose of this item is to inform Committee members of SCAG staff's intention to engage local agencies in the development of the 2020 RTP / SCS and explore what the engagement process will entail and what may be asked of member agencies.

Requested Action:

1. Receive and file.

SCAG will be engaging with local jurisdictions, subregional agencies, and other stakeholders to inform development of the 2020 RTP/SCS. This collaborative process will entail four phases and will be concurrent with the development of SCAG's Regional Housing Needs Assessment (RHNA): (1) Regular Technical Consultation; (2) One-on-One Outreach and Local Input on Planned Growth; (3) Regional Collaboration on Sustainable Communities Scenario Development; and (4) Engagement with the General Public on Potential Options for the SCS. Leading up to phase two kickoff in fall 2017, staff has been working with SCAG's Technical Working Group and other stakeholders to refine and finalize the technical methodology for this process. Subregional agencies, such as WRCOG, will also provide essential assistance during the coming months to refine the approach and convene local jurisdictions for discussion and subsequent one-on-one meetings with SCAG staff.

Kimberly Clark, SCAG Regional Planner Specialist, will provide Committee members with an introduction to the planned 2020 RTP/SCS local input process. In the coming months, SCAG staff will be arranging one-on-one meetings with each member agencies' Planning Director. WRCOG staff are available to participate in these meetings at the request of member jurisdictions.

Prior Action:

None.

Fiscal Impact:

This item is informational; therefore there is no fiscal impact.

Attachment:

1. Bottom-Up Local Input and Envisioning Process for the 2020 RTP/SCS.

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Item 5.B

Bottom-Up Local Input Process for
the 2020 Regional Transportation
Plan / Sustainable Communities
Strategy (RTP/SCS)

Attachment 1

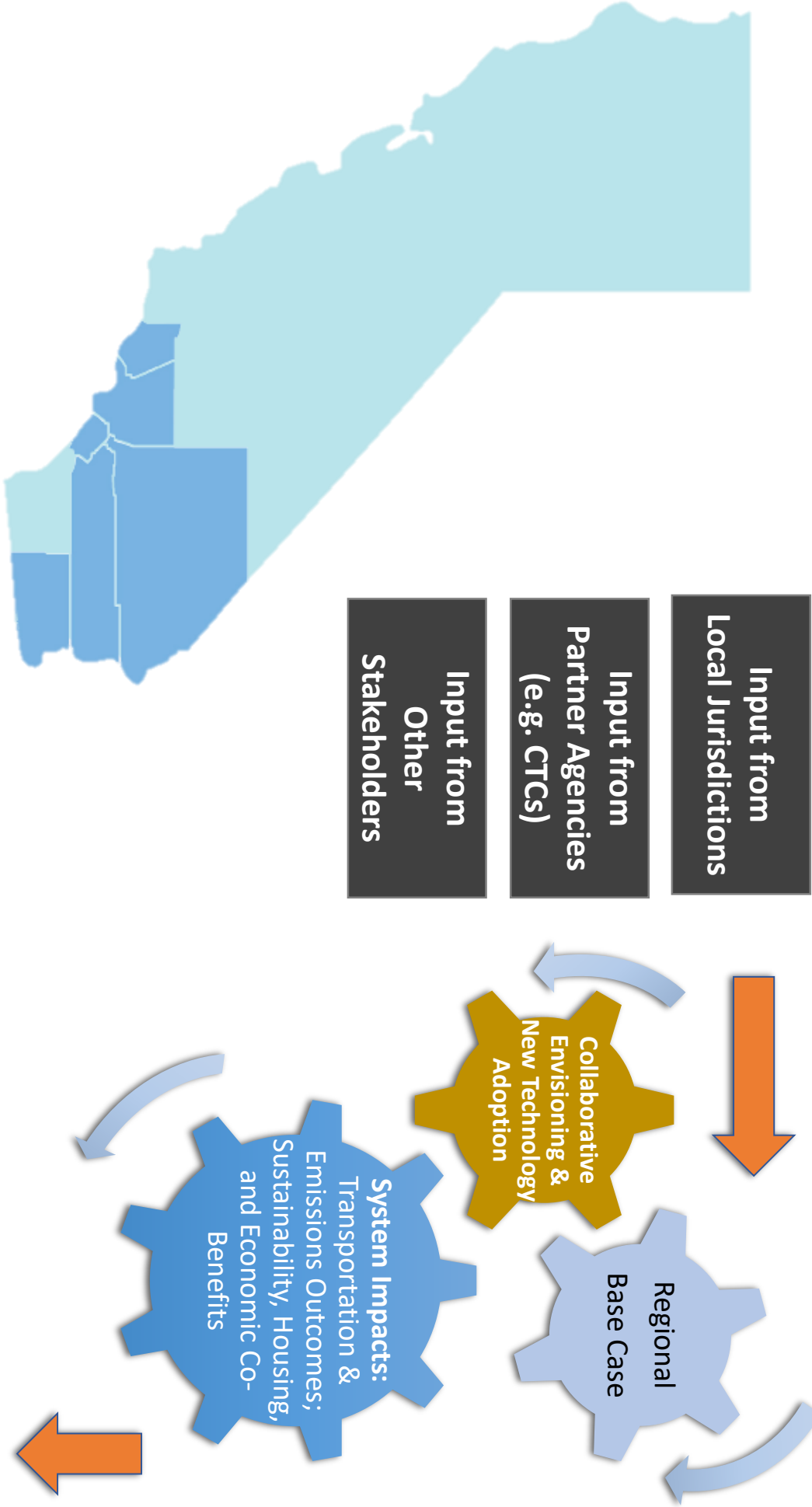
Bottom-Up Local Input and
Envisioning Process for the 2020
RTP/SCS

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Bottom-Up Local Input and Envisioning Process for the 2020 RTP/SCS



2020 RTP/SCS Plan Development Process



Regional Transportation Plan & Sustainable Communities Strategy

Bottom-Up Local Input and Envisioning Process *Phases and Schedule*

2020 RTP/SCS

197 Jurisdictions



Concurrent Process:
Regional Housing Needs Assessment
(June 2017 – Fall 2021)



Phase 4: Engagement with the General Public on Potential Options for the SCS
(Winter 2019 – Spring 2019)



Phase 3: Regional Collaboration on Scenario Development
(Spring 2018 – Spring 2019)

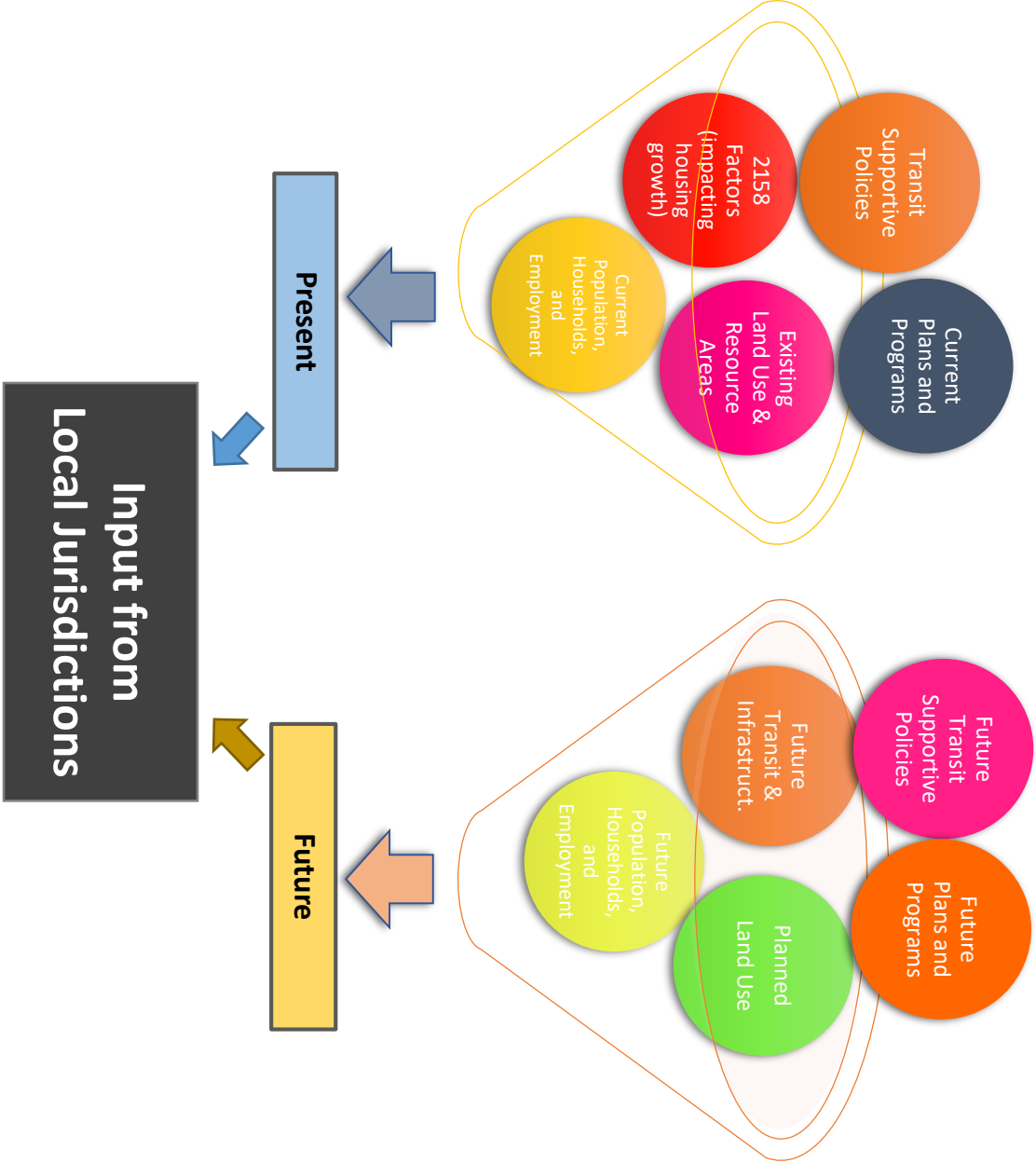


Phase 2: One-on-One Outreach and Local Input on Planned Growth
(October 2017 – September 2018)



Phase 1: Regular Technical Consultation
(June 2017 – Spring 2020)

Phase 2: One-on-One Outreach and Local Input on Planned Growth Data Elements



Process will Began in October 2017 and will conclude in September 2018

Bottom-Up Local Input and Envisioning Process

Guiding Principles

- SCAG will engage with jurisdictions one-on-one to establish a regional profile of base land use, population, household and employment growth, resource areas, sustainability practices, and local transit-supportive plans and policies. SCAG will also seek input from CTCs on planned transportation infrastructure through the horizon year of the RTP/SCS.
- SCAG will assess the GHG reduction potential of existing plans and policies in the Southern California region, including the establishment of an RTP/SCS “base case” that takes into account local land use policies, planned growth, sustainability practices, resource areas, transit-supportive plans and policies, and anticipated transportation improvements for the RTP/SCS.
- SCAG will develop multiple scenarios that explore a range of land use and transportation strategies. These scenarios will illustrate the impact of distinctive policy and investment choices, and will be examined in relation to the “base case” in order for the Regional Council and Policy Committees to evaluate the merits of regional decisions for the Plan.
- Feedback on potential GHG reduction strategies will be solicited from local jurisdictions, CTCs, and other stakeholders through regional collaboration prior to inclusion in the draft SCS.
- SCAG will also engage with the general public to help inform the draft SCS scenarios, in accordance with SB 375 and SCAG’s updated Public Participation Plan.
- The RHNA will be developed in coordination with the RTP/SCS.
- Input from local jurisdictions throughout the process will be accepted from each jurisdiction’s city manager, community development/planning director, or their designee; at their option, jurisdictions may elect to have the governing body approve local input.

Questions? – Thank You!





Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: Regional Housing Needs Assessment (RHNA) Overview

Contact: Ma'Ayn Johnson, SCAG Housing & Land Use Planner, (213) 236-1975, johnson@scag.ca.gov, (213) 236-1975

Date: October 12, 2017

The purpose of this item is to introduce the Committee to the 6th Cycle Regional Housing Needs Assessment outreach process.

Requested Action:

1. Receive and file.

The Regional Housing Needs Assessment (RHNA) is an assessment process performed periodically as part of housing element and General Plan updates at the local level. The RHNA quantifies the need for housing by income group within each jurisdiction during specific planning periods. The 5th cycle Final RHNA Allocation Plan was adopted by the SCAG Regional Council on October 4, 2012, and covers the planning period from October 15, 2013, to October 15, 2021. The RHNA is used in land use planning, to prioritize local resource allocation and to help decide how to address existing and future housing needs. The RHNA allows communities to anticipate growth, so that collectively the region can grow in ways that enhance quality of life, improve access to jobs, promote transportation mobility and address social equity and fair share housing needs. The regional projected housing need for the 5th cycle RHNA planning period is 412,137 units.

Ma'Ayn Johnson, SCAG Housing & Land Use Planner, will provide an overview of RHNA and discuss the process for developing the 6th Cycle, October 2021 – October 2029, and the outreach process.

Prior Action:

None.

Fiscal Impact:

This item is informational; therefore there is no fiscal impact.

Attachment:

1. An overview of the RHNA Regional Housing Needs Assessment.

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Item 5.C

Regional Housing Needs Assessment (RHNA) Overview

Attachment 1

An overview of the RHNA Regional
Housing Needs Assessment

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An Overview of the Regional Housing Needs Assessment (RHNA)

October 12, 2017

Ma'Ayn Johnson, AICP
Housing & Land Use Planner



The Purpose of RHNA

HOUSING SUPPLY HAS NOT KEPT UP WITH POPULATION GROWTH



IT'S COMPOUNDED BY A DEMOGRAPHIC SHIFT



Goals of RHNA

- Increase the housing supply and mix of housing types, tenure and affordability in an equitable manner
- Promote infill development and socioeconomic equity and encouragement of efficient development patterns



Goals of RHNA

- Promoting an improved intraregional relationship between jobs and housing
- Allocating a lower proportion of housing need to an income category when a jurisdiction already has a disproportionately high share compared to the countywide distribution

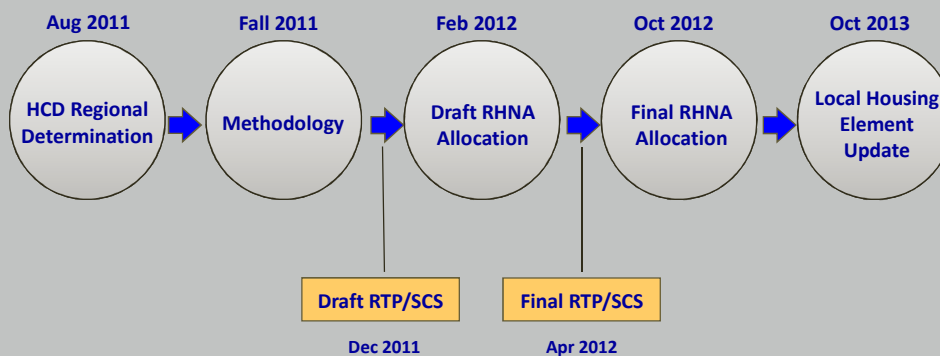


5th Cycle RHNA: 2013-2021



- The total regional need, by income category, must be met in the final RHNA allocation
- Projection period: 2014-2021
- Final regional determination for the 2012 RHNA:
412,137

5th Cycle RHNA Process



5th Cycle RHNA Methodology

- Total RHNA Allocation =
 - + Projected household growth
 - + Healthy market vacancy need
 - + Housing replacement need
 - Excess vacancy credit

- 110% social equity adjustment applied using the median county income

RHNA Allocation Methodology: City A

1,478 units of Projected Household Growth

Existing Housing Types

60.5% Owner-Occupied
= 894 of total units

39.5% Renter-Occupied
= 584 of total units

Healthy Market Vacancy

894 units X 1.5% = 13 units

584 units X 4.5% = 26 units

13 units + 26 units = 39 units

1,478 units + 39 units =
1,517 units of Growth and Vacancy Need

RHNA Allocation Methodology: City A

1,517	Units of Growth and Vacancy Need
+	
11	Replacement need
1,528	Growth + vacancy need + replacement need

RHNA Allocation Methodology: City A

1,528	Growth + vacancy need + replacement need
-	
175	Total excess vacancy credit
1,353	City A Total Draft RHNA Allocation

RHNA Household Allocation: Adjusted for Equity

Existing Conditions:

Household Income Level	City A	County Distribution
Very Low Income	19.5%	22.9%
Low Income	16.5%	16.8%
Moderate Income	18.1%	18.5%
Above Moderate Income	45.9%	41.8%

To mitigate the over-concentration of income groups each jurisdiction will move 110% towards county distribution in all four categories:

Household Income Level	City A Adjusted Allocation
Very Low Income	$19.5\% - [(19.5\% - 22.9\%) \times 110\%]$
Low Income	$16.5\% - [(16.5\% - 16.8\%) \times 110\%]$
Moderate Income	$18.1\% - [(18.1\% - 18.5\%) \times 110\%]$
Above Moderate Income	$45.9\% - [(45.9\% - 41.8\%) \times 110\%]$

Final RHNA Allocation

Income Category	City A Distribution Before Adjustment	City A Adjusted Distribution	RHNA Allocation (units)
Very Low	19.5%	23.2%	314
Low	16.5%	16.8%	227
Moderate	18.1%	18.6%	252
Above Moderate	45.9%	41.4%	560
Total	100%	100%	1,353

6th Cycle RHNA

- Latest adoption date: October 2020
- Planning period
October 2021-October 2029
- Fall 2017
Start of the Local Input Process

Beyond RHNA

- Local Input Process
 - Fall 2017
 - Use in RHNA and RTP/SCS
- Annual Progress Reports
 - SB 1 and other funding

THANK YOU!

Ma'Ayn Johnson, AICP
Housing & Land Use Planner

Johnson@scag.ca.gov

For more information, please visit www.scag.ca.gov

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Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: Cannabis Regulatory Updates

Contact: Cynthia Mejia, Staff Analyst, cmejia@wrcog.us, (951) 955-8311

Date: October 12, 2017

The purpose of this item is to provide an update on cannabis regulatory measures in California and how member jurisdictions are addressing the cannabis industry locally.

Requested Action:

1. Receive and file.

Before Proposition 64 was approved by voters in 2016, other propositions had established a foundation for the legalization of marijuana. Although cannabis remains a Schedule I drug at the Federal level, local jurisdictions retain local control over regulatory measures or banning the sale altogether.

Background

In 1996, voters approved Proposition 215, legalizing the use of medical marijuana in the state of California. In 2015, the legislature passed three bills: Assembly Bill (AB) 243 (Wood), AB 266 (Bonta) and Senate Bill (SB) 643 (McGuire) that altogether established provisions for cultivation, manufacturing, retail sale, transportation, storage, testing and delivery of medical marijuana. The combined three bills established the backbone of the Medical Cannabis Regulation and Safety Act (MCRSA). In November of 2016, voters passed Proposition 64, the Adult Use of Marijuana Act (AUMA).

Under Proposition 64, the Adult Use Marijuana Act (AUMA), adults over the age of 21 are legally able to possess, grow, and use cannabis for non-medicinal reasons, with restrictions. In addition, Proposition 64 allows for the sale of cannabis through a business. Proposition 64 is scheduled to take effect January 1, 2018.

Although the State of California has legalized medicinal and recreational marijuana, it remains a Schedule I drug under the Federal government. For that reason, the State has established tracking and labeling requirements that track cannabis products from seed to sale. In addition, the state has also stepped in to establish pesticide regulations for cannabis products, since the U.S. Food and Drug Administration is unable to assist due to the aforementioned Federal / State challenges.

Current California Law

SB 94, or the Medicinal and Adult Use Regulation and Safety Act (MAUCRSA), was the cannabis trailer bill for the California Budget Act of 2017. SB 94 combined both MAUCRSA and Proposition 64 to eliminate duplicative costs relating to the regulation of cannabis. SB 94 aims to reconcile the differences between the State's medicinal and adult use cannabis regulations and clarifies ambiguities relating to the licensing of both product types.

MAUCRSA sets forth a few changes, such as the creation of the Bureau of Cannabis Control, which will work with local governments to compile ordinances including bans. It also requires that, in areas with no local jurisdictional permitting, applicants for licenses must submit environmental impact statements in order to comply with state regulations. The purpose of these changes was to establish a regulatory system to govern the cannabis industry in an effort to “protect public and consumer safety” (California Department of Finance) while protecting local control.

Western Riverside County

WRCOG staff surveyed member jurisdictions to gain a better understanding of what regulations will be in place locally come January 1, 2018. Some WRCOG member jurisdictions have taken approaches on whether they will allow portions of medical cannabis cultivation, delivery, transportation or manufacturing. A number of member jurisdictions have taken proactive measures to ban all cannabis activity in their jurisdictions. Staff will share a summary of findings at the October 12, 2017, PDC meeting.

Prior Action:

None.

Fiscal Impact:

This item is receive and file and therefore has no fiscal impact.

Attachment:

None.



Western Riverside Council of Governments

Planning Directors' Committee

Staff Report

Subject: Grant Writing Assistance Program

Contact: Christopher Tzeng, Program Manager, tzeng@wrcog.us, (951) 955-8379

Date: October 12, 2017

The purpose of this item is to provide an update on WRCOG's Grant Writing Assistance Program aimed to provide direct assistance to its member jurisdictions.

Requested Action:

1. Receive and file.

WRCOG has commenced the Grant Writing Assistance Program to assist its member jurisdictions in grant writing. WRCOG has funds to assist and this Program assists member jurisdictions on an as-needed basis as funding is available. The Program Guidelines have been approved, certain steps have been established for member jurisdictions to take in order to request assistance, and an additional benefit has been provided for member jurisdictions.

Grant Writing Assistance Program Overview

WRCOG secured a bench of consultants to help jurisdictions prepare grant applications in five program areas (Active Transportation; Caltrans Sustainable Transportation and Adaptation Planning; Affordable Housing and Sustainable Communities; electric vehicle and alternative fuel readiness or funding related to Clean Cities activities; and any new planning grant opportunities). The pilot Program aims to strengthen the region's overall competitiveness for statewide funding and to provide needed supplemental support to jurisdictions prevented from seeking grant funds due to limited capacity and/or resources. WRCOG allocated \$200,000 toward this pilot Program. Assistance will be provided on a first-come, first-served basis. Please refer to the Guidelines for more information on Program logistics, provided as Attachment 1, and available online at: <http://www.wrcog.us/266/Grant-Writing-Assistance>.

Steps to Request Assistance

To receive assistance, member agencies must submit an Application (Attachment 2). In order to ensure funds for this Program are utilized effectively and efficiently, the Application is meant to provide information on how the project will generate a competitive application. The Application is also to ensure the member agency reviews the minimum expectations for agency staff, as the consultant will need a small amount of assistance in getting the application commenced. Once the Application is submitted to WRCOG, it will be reviewed within seven calendar days and WRCOG staff will determine whether the request meets the Guidelines. If met, WRCOG will work with the applicant to select a proper consultant from the bench.

Recognizing grants eligible for assistance have varying grant cycles, while the Program operates on a "first-come-first-served" basis, WRCOG also welcomes member agencies to submit a Notice of Interest (Attachment 3). The Notice of Interest, not required but strongly recommended, will make WRCOG staff aware of the

jurisdiction's intention to submit an Application when or before the grant opens and will help WRCOG better ensure that interested jurisdictions receive assistance with at least one application.

Grant Opportunities Summary Table

In addition to the grant writing assistance, WRCOG will provide regular updates on various grant opportunities that may be of interest to jurisdictions with the goal of returning as much grant funding to member agencies as possible. In the first Grant Opportunities Summary, provided as Attachment 4, there are two tables: Table 1 provides possible grant opportunities that WRCOG may be able to assist member agencies with grant writing; and Table 2 provides additional opportunities for agencies that cannot be facilitated by WRCOG, but might be of interest. The grant opportunities also have a "Level of Difficulty" to provide an indication of the level of support needed to develop applications. Lastly, "Success Rates" have been included to provide the number of applications awarded in relation to the number of applications submitted.

Prior Action:

September 11, 2017: The Executive Committee received report.

Fiscal Impact:

This item is included in the Agency's adopted Fiscal Year 2016/2017 Budget under the Transportation Department.

Attachments:

1. Grant Writing Assistance Program Guidelines.
2. Grant Writing Assistance Application.
3. Grant Writing Assistance Interest Form.
4. Grant Opportunities Summary Table – 09/29/17.

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Grant Writing Assistance Program

Attachment 1

WRCOG Grant Writing Assistance
Program Guidelines

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WRCOG Grant Writing Assistance Program Guidelines

Program Overview: The WRCOG Grant Writing Assistance Program (Program), launched in September 2017, is designed to assist members in preparing proposals for grant opportunities. WRCOG allocated funding for an initial pilot of the Grant Writing Assistance Program for its members. To provide a Program that best assists WRCOG members, WRCOG staff convened a Focus Group of member agency staff to provide feedback on Program specifics and develop Program Guidelines, which were approved by the WRCOG Executive Committee on September 11, 2017.

Grant Writing Consultants: WRCOG released a Request for Proposals (RFP) in March 2017 for consultants to serve on a “bench” to provide grant writing assistance to WRCOG member agencies. The bench of consultants is available to members on a first-come, first-served basis when funding opportunities for the selected grants become available. The consultants will assist members with the grant application process only, not with subsequent award management or project implementation. The following consultants were selected to assist our member agencies with grant preparation:

- Alta Planning + Design
- Blais & Associates
- KTUA
- National Community Renaissance
- WSP

Program Contact:

Christopher Tzeng

Program Manager, Transportation

Phone: (951) 955-8379

Email: ctzeng@wrcog.us

Website: <http://www.wrcog.us/266/Grant-Writing-Assistance>

Program Guidelines: The Guidelines define the parameters of the Program, including the following items:

1. Eligible grants;
2. Expectation of member agencies accepting assistance;
3. Linkage to other WRCOG programs;
4. Screening process; and
5. Process to request grant writing assistance.

#1 - Eligible grants: For this pilot, the Program focuses on a few select grant opportunities. Eligible grants are as follows:

- [Active Transportation Program](#)
- [Caltrans Sustainable Transportation Planning Grant Program](#) (Transportation Planning Grants & Adaptation Planning Grants)
- [Affordable Housing and Sustainable Communities Program](#)
- [Clean Cities](#) related grants
- New planning grant opportunities

To maintain flexibility with the Program, “new planning grant opportunities” are included so that other grant opportunities related to planning may be considered. This category enables members to request assistance if any grant opportunities that focus on planning grants become available – such as those that help fund General Plans, Specific Plans, or Community Plans.

*Ineligible Grants: The Program is **not** intended to assist infrastructure grant opportunities, i.e., TIGER, HSIP, FASTLANE, etc.*

Assistance with Clean Cities grants is available for WRCOG Clean Cities Coalition members only. Assistance is available for grant opportunities related to Clean Cities activities, such as electric vehicle charging stations and city / county fleet purchasing. Funding for assistance with these grants will be allocated from Coalition funds. WRCOG administers the Coalition on behalf of participating member agencies which pay specific Coalition dues. This Program can increase the Coalition’s effectiveness by assisting Coalition members attain grant funding.

#2 - Expectation of member agency accepting assistance: WRCOG member agencies must submit a formal request using the [Application for Grant Writing Assistance](#) form to WRCOG. WRCOG will only authorize a consultant to provide assistance if a WRCOG member agency submits an Application to WRCOG for the eligible grant opportunities listed above.

In order for the Program to run effectively and utilize funds efficiently, the member agency accepting grant writing assistance must agree to the following:

- Define project parameters and provide consultant a basic project description
- Dedicate sufficient resources:
 - Obtain all necessary material on the information checklist provided by the consultant
 - Attend kick-off meeting to ensure consultant has needed information to prepare grant application
 - Respond to inquiries from the consultant in a timely manner
- Be the responsible party for grant submittal, including signatory on application and actual submittal of the application

It is expected that once the member agency is awarded the assistance for a grant application, and the consultant is selected to assist, all parties will participate in a kick-off meeting to discuss the proposal and share necessary information to begin work on the grant application. The consultant will prepare the grant application and all necessary exhibits, tables, etc., for review by the member agency staff. The member agency will then provide comments to be addressed by the consultant, and the consultant will then revise the application based on comments provided. Finally, the consultant will provide the member agency staff with a final draft for review and submittal.

#3 - Linkage to other WRCOG programs: To qualify for assistance through the Program, projects must meet the following specific criteria. First, grant proposals receiving assistance must show a nexus to the core components of WRCOG's [Economic Development and Sustainability Framework](#) (Framework). The Economic Development and Sustainability Framework is a foundational document for planning in Western Riverside County consisting of six core components adopted by the Executive Committee. In addition, grant proposals must also demonstrate a nexus to a regionally significant plan, such as WRCOG's [Subregional Climate Action Plan](#), the Western Riverside County Active Transportation Plan, and/or the RCTC Long-Range Plan. Lastly, a grant proposal is preferred to be multi-jurisdictional, but is not mandatory – this is to align with many grant opportunities that favor larger, regional projects.

#4 - Process to request grant writing assistance:

1. Member agency submits an Application, formally requesting grant writing assistance with a specific grant. WRCOG will leave it to the discretion of the member agency how this request is made, whether it is through the elected body, WRCOG representative, or other party to act on behalf of the City. WRCOG will assume that if it receives a request for assistance from a member agency representative, that representative is authorized to act on behalf of the member agency.
 - a. WRCOG prepared a [Grant Writing Assistance Interest Form](#) (Interest Form), to enable jurisdictions to indicate potential interest in receiving support for a specified grant funding category/categories, tentatively reserving a place in line for grant writing assistance. This is in lieu of the varying time tables for each grant opportunity and the first-come first-served nature of the assistance.
 - b. An Interest Form is not required, but recommended for those wishing to apply for assistance with grant opportunities which become available later in the Program cycle.
2. WRCOG staff will review the applications within seven calendar days and determine whether the request meets the guidelines, as noted below.
3. If the Application meets the criteria set in these Guidelines, WRCOG will work with the applicant to select a proper consultant from the list of pre-approved consultants.
4. Kick-off meeting will be held with agency and consultant.

#5 - Screening process: In order to ensure funds for the Program are utilized effectively and efficiently, an Application must be submitted to WRCOG for review. Upon receipt the Application will be reviewed to ensure Program criteria, as outlined above, are met, demonstrating a nexus to the Framework as well as a regionally significant plan, and the project will generate a competitive application, as assessed by such factors as being multi-jurisdictional. WRCOG and consultants will also confirm, based on timing of Application receipt, whether there is sufficient time to develop a competitive grant application.

The criteria set in these Guidelines, serve as basic standards for proposals to be evaluated. The selection of proposals for grant writing assistance will be at the discretion of WRCOG based on available funding, and WRCOG reserves the right to decide which proposals receive grant writing assistance.

Tentatively, no member will receive assistance on more than two grants. This is a soft limit as it will be based on the number of applications received.

Nothing in this Program will be construed as limiting member agencies from hiring other consultants to prepare grants on their behalf.

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Grant Writing Assistance Program

Attachment 2

WRCOG Grant Writing Assistance
Program Application

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WRCOG Grant Writing Assistance Application

WRCOG Member Agency:

Agency staff contact information (consultant will contact this person to coordinate application)

Name:

Phone:

Email:

Grant program applying for (check one box per Application):

Active Transportation Program

Caltrans Sustainable Transportation Planning Grant Program

Affordable Housing and Sustainable Communities Program

Clean Cities related (electric vehicle, alternative fuels, etc.)

New planning grant opportunities

Total amount requesting from Grant Program:

Brief project description (200 words max):

Is the proposed project multi-jurisdictional? Yes No

To be eligible for assistance, applicants must be able to help the consultant gather basic information for the application. Please check the boxes below to confirm applicant agency's ability to fulfill some of the potential requirements:

Participate in a kick-off meeting. To include defining project parameters and providing consultant with a basic project description.

Obtain all necessary material on the information checklist to be provided by the consultant. For example: provide internal data and information as required by the grant application.

Respond to inquiries from the consultant in a timely manner.

Be responsible for grant submittal, including application signature and physical submittal.

Please return completed Application as soon as possible to ctzeng@wrcog.us. WRCOG and Consultants will use discretion to determine if there is sufficient time to prepare a competitive grant application, based on when the Application is received.

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Grant Writing Assistance Program

Attachment 3

WRCOG Grant Writing Assistance
Program Interest Form

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Grant Writing Assistance Program Interest Form

Return this form to ctzeng@wrcog.us or complete an [online form](#) as soon as possible.

- The funds available to support this pilot round of the Grant Writing Assistance Program (Program) will be distributed on a first-come first-served basis.
- The grants eligible for assistance have varying timetables throughout the year.
- To ensure equitable distribution of assistance, complete the below table to indicate potential interest in receiving support for a specified grant funding category/categories, tentatively reserving your agency's place in line for grant writing assistance.
- In the table below, please check up to two grant areas your agency might be interested in applying for assistance through the Program. If selecting two, please rank your order of preference for assistance by checking the appropriate box.
- WRCOG staff will use the form to assign the most equitable distribution of resources possible.
- Please note: Not submitting this form will NOT preclude your agency from requesting grant writing assistance later. And, submitting the form will NOT guarantee assistance.
- A [Grant Writing Assistance Application](#) (Application) will be required, with as much advance notice of the due date as possible. Consultants will use discretion to determine if there is sufficient time to prepare a competitive grant application, based on when the Application is received.
- For more information, please refer to the [Program Guidelines](#).

Agency:

Contact Name:

Contact email:

Contact Phone:

Grant Writing Assistance Interest			
Grant Area	Due Date	First Priority	Second Priority
Caltrans: Sustainable Transportation Planning Grant and Adaptation Planning Grant	Due October 20, 2017		
Active Transportation Program – California Transportation Commission	NOFA expected Spring 2018		
Affordable Housing Sustainable Communities	NOFA expected October 2, 2017		
Clean Cities Related Grants	Varying		
New Planning Grant Opportunities	Varying		

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Grant Writing Assistance Program

Attachment 4

Grant Opportunities Summary
Table – 09/29/17

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**Western Riverside Council of Governments
 Grant Opportunities and Forecast
 September 29, 2017**

(New is noted for grants added in the past 14 days)



The grant opportunities beginning on the next page are part of WRCOG's emphasis to return as much grant funding to member agencies as possible. To that end, WRCOG may be able to assist member agencies with grant writing for the grant programs listed in Table 1. Please also see Table 2 for additional opportunities for your agency that cannot be facilitated by WRCOG, but might be of interest.

To help clarify the level of effort needed to develop the proposals, we have created a key for ready reference.*

Key: Level of Difficulty (LOD)	
Simple	A simple level of difficulty indicates an application that may take 8 hours or less to develop, and can likely be accomplished "in-house" with minimal effort/allocation of internal resources.
Medium	A medium level of difficulty indicates an application process that will take a more substantial allocation of internal resources to accomplish, and might possibly require outside assistance (20-70 hours to develop application).
Complex	A complex level of difficulty indicates a VERY competitive opportunity, with a small success rate and intensive grant-development and positioning.

Additionally, we have included the "Success Rates" for each opportunity (if known). This statistic is indicated in **blue** in the "Notes" column, and provides the number of applications awarded in relation to the number of applications submitted (if known).*

*These keys are not listed for "On the Horizon/NOFAs Not Released" section of Table 2.

Please contact Chris Tzeng, WRCOG Program Manager, at (951) 955-8379 for more information about grant writing assistance.

TABLE 1							
Grant opportunities that <u>may</u> be eligible for WRCOG-assisted grant writing							
No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Notes
The grants that might be eligible for WRCOG grant-writing assistance are:							
1	Possibly June 2018	Active Transportation Program. To increase the proportion of trips accomplished by biking and walking, and provide a broad spectrum of projects to benefit many types of active transportation users. Eligible Project Types in the Last Round (subject to change): • Community-wide bicycle, pedestrian, Safe Routes to School, or active transportation plans in disadvantaged communities. • Bikeways and walkways that improve mobility, access, or safety for non-motorized users. • Improvements to existing bikeways and walkways. • Elimination of hazardous conditions on existing bikeways and walkways. • Installation of traffic control devices to improve the safety of pedestrians and bicyclists. • Safe Routes to School projects that improve the safety of children walking and bicycling to school. • Secure bicycle parking at employment centers, park and ride lots, rail and transit stations, and ferry docks and landings for the benefit of the public. • Recreational trails and trailheads, park projects that facilitate trail linkages or connectivity to non-motorized corridors, and conversion of abandoned railroad corridors to trails.	California Transportation Commission	State	\$240 million	Not required.	http://www.catc.ca.gov/program_s/ATP.htm Success Rate: 11% 456 applications received; 50 applications funded at State level. LOD: Medium
	Transportation Improvements						

TABLE 1 **Grant opportunities that <u>may</u> be eligible for WRCOG-assisted grant writing**							
No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Notes
2A	October 20, 2017 Planning	SB 1 Sustainable Transportation Planning Grant Program. To develop local plans that encourage sustainable infrastructure improvements to reduce GHG, Vehicle Miles Traveled, and increase safety, and/or provide access to Public Transit. Expected Eligible Project Types (not limited to these): - Studies, plans or planning mechanisms that advance a community's effort to reduce single occupancy vehicle trips and transportation related GHG through strategies including advancing mode shift, demand management, travel cost, operational efficiency, accessibility, and coordination with future employment and residential land use. - Studies, plans or planning mechanisms that assist transportation agencies in creating sustainable communities and transit oriented development. - Community to school studies or Safe Routes to School plans. - Studies, plans or planning mechanisms that advance a community's effort to address the impacts of climate change and sea level rise. - Studies that promote greater access between affordable housing and job centers. - Context-sensitive streetscapes or town center plans - Complete streets plans. - Active transportation plans, including bicycle, pedestrian and trail master plans. - Bike and pedestrian plans with a safety enhancement focus, including Vision Zero plans. - Traffic calming and safety enhancement plans.	Caltrans	State	Minimum: \$50,000 for DAC; \$100,000 for All Others Maximum: \$1,000,000	11.47%	http://www.dot.ca.gov/hq/tpp/grants.html Partnerships are highly encouraged Success Rate: N/A. This is a new program LOD: Medium

TABLE 1 **Grant opportunities that <u>may</u> be eligible for WRCOG-assisted grant writing**							
No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Notes
2B	October 20, 2017	SB 1 Adaptation Planning Grant. For climate change adaptation planning. Example of plans: • Climate vulnerability assessments. • Extreme weather event evacuation planning. • Resilience planning. • Transportation infrastructure adaptation plans. • Natural and green infrastructure planning (e.g. wetlands restoration along transportation corridors to protect transportation infrastructure from flooding and storm impacts). • Integration of transportation adaptation planning considerations into existing plans, such as climate mitigation or adaptation plan, Local Coastal Program (LCP), Local Hazard Mitigation Plan (LHMP), General Plan or other related planning efforts. • Evaluation of or planning for other adaptation strategies, such as: - o Providing transit shelters with shade, water, or other means of cooling in locations expected to see temperature increases. - o Planning for distributed energy and storage to provide decentralized energy system for safeguarding against loss of power and impacts to electric vehicles due to climate-related grid disruptions.	Caltrans	State	Minimum: \$100,000 Maximum: \$1 million	11.47%	http://www.dot.ca.gov/hq/tpp/grants.html Partnerships are highly encouraged Success Rate: N/A. This is a new program LOD: Medium

TABLE 1 **Grant opportunities that <u>may</u> be eligible for WRCOG-assisted grant writing**							
No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Notes
3	NOFA expected 10/2/17 Housing	Affordable Housing and Sustainable Communities. To fund projects) that result in: the reduction of GHG emissions and vehicle miles traveled (VMT) and increased accessibility of housing, employment centers and key destinations through low-carbon transportation options such as walking, biking and transit. Eligible <u>Capital Projects</u> in Last Round (subject to change): • Affordable Housing Development (loan) (Bricks and Mortar). • Housing-Related Infrastructure (grant) (Required as Condition of Approval). • Sustainable Transportation Infrastructure (grant). • Transit, Bike Lanes, Sidewalks. • Transportation-Related Amenities (grant). • Bike Parking, Repair Kiosks, Urban Greening, Bus Shelters. Eligible <u>Programs</u> (3 Year Grants) in Last Round: • Active Transportation Programs. • Transit Ridership Programs. • Criteria Air Pollutant Reduction Programs. Project areas must include a Qualifying Transit, defined as a transit line serving the public that is operated by a public entity, or operated as a grant recipient from a public entity. All Project Areas MUST also include a Transit Station/Stop, which is served by at least one Qualifying Transit line departing 2 or more times during Peak Hours.	Strategic Growth Council	State	Maximum loan or grant or combination for Project Area is \$20 million with a minimum award of at least \$1 million for TOD Project Areas and at least \$500,000 for ICP and RIPA Project Areas.	Not stated	http://sgc.ca.gov/v/Grant-Programs/AHSC-Program.html Success Rate: 29% 85 full applications received; 25 applications awarded. LOD: Medium

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
Grants that are not eligible for WRCOG grant writing assistance.							
1	Ongoing/ Reviewed quarterly Sports	Baseball Tomorrow Fund. - Grants are intended to provide funding for incremental programming and facilities for youth baseball and softball programs, not for normal operating expenses or as a substitute for existing funding or fundraising activities. - The funds may be used to finance a new program, expand or improve an existing program, undertake a new collaborative effort, or obtain facilities or equipment necessary for youth baseball or softball programs. - Grants are designed to be flexible to enable applicants to address needs unique to their communities.	Baseball Tomorrow Fund	Private	No maximum. Average award is \$40,000	50%	www.baseballtomorrowfund.com Success Rate: 10% Approximately 400 applications are received annually; approximately 40 are funded.
2	Deadline has expired but you may submit applications for future consideration GHG Reduction	Volkswagen California Zero Emission Vehicle (ZEV) Investment Plan. To support the growth of the Zero Emission Vehicle market; increase the availability of the ZEV infrastructure; increase awareness of ZEVs; and, increase access to ZEVs across California. https://www.arb.ca.gov/msprog/vw_info/vsi/vw-zevinvest/vw-zevinvest.htm	California Air Resource Board/ Electrify America	Private	Not identified.	Not required.	https://www.electrifyamerica.com/our-plan Success Rate: Unknown at this time. LOD: Complex

TABLE 2
For Information Purposes Only

****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
3	Rolling Deadline	Accelerated Innovation Deployment (AID) Demonstration. To accelerate the use of innovation in highway transportation projects. NOTE: Applications accepted on a rolling basis until funding is no longer available. Applicants should apply when the eligible project is ready to authorize within 12 months.	Federal Highway Administration	Federal	\$1 million	20%	https://www.fhwa.dot.gov/innovation/grants/ Success Rate: Unknown at this time. LOD: Medium
4	Opened 09/01/17 Accepted first-come, first-served for one year. Economic Development	CDBG Economic Development (ED) Over the Counter. Funding to non-entitlement cities and counties. Projects consist of financial assistance to a single business or a large number of assisted businesses served by common infrastructure. The most common form of an OTC project is a single business with a single project where funds are provided as a loan from the jurisdiction/grantee to and eligible borrower.	California Housing and Community Development	State	\$10 million	Appears not required.	http://www.hcd.ca.gov/grants-funding/nofas.shtml#current Success Rate: Unknown at this time. LOD: Medium
5	10/02/17 Police	Law Enforcement Specialized Units. To create or enhance specialized units to provide a coordinated response to victims of domestic violence and their children.	California Office of Emergency Services	State via Federal	Up to \$203,143 per year for three years.	25%	Link Success Rate: Unknown at this time. LOD: Complex

TABLE 2
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****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
6	10/02/17 Habitat Preservation	Habitat Conservation Fund. To protect fish, wildlife, and native plant resources, to acquire or develop wildlife corridors and trails, and to provide for nature interpretation programs and other programs which bring urban residents into park and wildlife areas. There are seven activity areas: 1. Deer/Mountain Lion Habitat 2. Rare, Endangered, Threatened, or Fully-Protected Species Habitat 3. Wetlands 4. Riparian Habitat 5. Anadromous Salmonids and Trout Habitat 6. Trails 7. Wildlife Area Activities	California State Parks	State	\$2 million	100%	http://www.parks.ca.gov/?page_id=21361 Success Rate: 19 applications were funded. It is unknown how many applications were submitted. LOD: Medium
7	10/05/17 Deadline extended from 09/14/17 Paving	Rubberized Pavement Grant. To divert waste tires from landfill disposal, prevent illegal tire dumping, and promote markets for recycled-content surfacing products derived from only California-generated waste tires. It is aimed at encouraging first-time or limited users of rubberized pavement in two project types – Rubberized Asphalt Concrete Hot-Mix (Hot-Mix) and Rubberized Chip Seal (Chip Seal).	CalRecycle	State	\$350,000 for individual application or \$500,000 for a regional application.	Not required	http://www.calrecycle.ca.gov/Tires/Grants/Pavement/FY201718/default.htm Success Rate: 51 applications were funded. It is not known how many applications were submitted. LOD: Simple

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
8	10/16/17 Transportation	TIGER. To fund surface transportation infrastructure projects that will have a significant impact on the Nation, a metropolitan area, or a region. Examples of Capital projects: • Highway or bridge projects eligible under title 23, United States Code • Public transportation projects eligible under chapter 53 of title 49, United States Code • Passenger and freight rail transportation projects • Port infrastructure and investments • Intermodal Projects	U.S. Department of Transportation	Federal	\$25 million / Minimum \$5 million. Rural area projects minimum is \$1 million.	20%. DOT may fund up to 100 percent for projects in rural communities.	https://www.transportation.gov/tiger Success Rate: 9% 627 applications received; 72 applications funded.
9	10/18/17 Concept Proposal 11/30/17 Full Application Implementation of Neighborhood Level Plans	Transformative Climate Communities Implementation. For the implementation of neighborhood-level plans that include multiple, coordinated projects that reduce greenhouse gas emissions and achieve other community benefits. • A minimum of half of the funds shall be allocated in the City of Fresno. - \$70 million. • A minimum of one-fourth of the funds shall be allocated in the City of Los Angeles - \$35 million. • The remaining funds, \$35 million, will be allocated in a third location to be determined competitively among eligible disadvantaged community areas, as identified in Appendix B of the guidelines.	Strategic Growth Council	State	\$35 million	50%	http://sgc.ca.gov/Grant-Programs/Transformative-Climate-Communities-Program.html Success Rate: N/A. This is a new program. LOD: Complex

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
10	11/01/17 Cycle 2 Waste Tires	Tire Derived Aggregate Grant Program. To provide opportunities to divert waste tires from landfill disposal, prevent illegal tire dumping, and promote markets for recycled-content tire products.	CalRecycle	State	\$350,000	Not required	http://www.calrecycle.ca.gov/Tires/Grants/TDA/FY201718/default.htm Success Rate: 100% 3 of 3 applications were funded. LOD: Simple
11	11/02/17 Applications accepted starting August 1, 2017	Nationally Significant Freight and Highway Projects (INFRA) Grant. For projects that address critical issues facing our nation's highways and bridges. Eligible INFRA project costs may include: reconstruction, rehabilitation, acquisition of property (including land related to the project and improvements to the land), environmental mitigation, construction contingencies, equipment acquisition, and operational improvements directly related to system performance. Applicants may resubmit their previous FASTLANE application, but must explain how the project competitively addresses the improved INFRA Grant criteria.	U.S. Department of Transportation	Federal	Small Projects: Minimum - \$5 million Large Projects: Minimum - \$25 million	40%	https://www.transportation.gov/bui/Idamerica/infra grants Success Rate: NA. This is a new program. LOD: Complex

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****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
12	11/22/17 Housing	Choice Neighborhoods Implementation Grant Program. To help communities transform neighborhoods by revitalizing severely distressed public and/or assisted housing and catalyzing critical improvements in the neighborhood, including vacant property, housing, businesses, services and schools.	U.S. Housing and Urban Development	Federal	\$30 million	5%	Link Success Rate: 5 large (\$20 million+) grants were awarded. LOD: Complex
13	11/29/17 School Construction	NEW: Career and Technical Education Facilities Program. The Career Technical Education Facilities Program (CTEFP) provides funding to qualifying school districts and joint powers authorities (JPA) for the construction of new facilities, modernization or reconfiguration of existing facilities, and equipment to integrate Career Technical Education programs into comprehensive high schools.	CA Department of Education	State	\$3 million state match for new construction \$1.5 million for modernization	100%	http://www.cde.ca.gov/sf/ta/sf/careertech.asp Success Rate: Unknown LOD: Complex

TABLE 2
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****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
14	11/30/17 Planning	Transformative Climate Communities Planning. To help communities increase their potential to successfully apply for and to implement future Transformative Climate Communities Implementation Grant awards, or other California Climate Investment programs. Examples of eligible projects: • Evaluating, updating, and streamlining various policies and codes currently enforced by the Planning Department and other local departments. • Building capacity both internally, among staff and departments, as well as externally, among stakeholders including the development of collaboratives and partnerships that connect land use development with environmental, economic and social justice priorities. • Preparing climate action and climate adaptation plans.	Strategic Growth Council	State	\$250,000	Not required.	http://sgc.ca.gov/Grant-Programs/Transformative-Climate-Communities-Program.html Success Rate: NA. This is a new program. LOD: Complex

TABLE 2
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****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
15	12/13/17	NEW: Food Insecurity Nutrition Grant. To increase the purchase of fruits and vegetables among low-income consumers participating in the Supplemental Nutrition Assistance Program (SNAP) by providing incentives at the point of purchase. There are three categories of projects: • Pilot Projects (FPP) • Multi-year, community-based Projects (FP) • Multi-year, Large-Scale Projects (FLSP) Examples include: innovative strategies working at point of purchase with SNAP authorized retailers, including food stores, market stands, farmers' markets, community supported agriculture programs, marketing and consumer cooperatives, and other SNAP authorized retailers.	U.S. Department of Agriculture	Federal	FPP - \$100,000 FP - \$500,000 FLSP - \$500,00	100%	https://www.fns.usda.gov/snap/FINIGrant-Program Success Rate: Unknown LOD: Medium

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
16	02/05/18 Outdoor Recreation	Land and Water Conservation Fund. To cooperatively acquire and/or develop outstanding properties in perpetuity for outdoor recreation purposes. Eligible projects include: • Create new parks within a half-mile of underserved communities. • Expand existing parks to increase the ratio of park acreage per resident in underserved areas. • Use the Geographical Information Systems (GIS) Tools available at www.parks.ca.gov/SCORP to locate areas that have one of the following conditions: - o Neighborhood areas that have no park within a half-mile (use the "Park Access Tool"). - o Communities or jurisdictions that have a ratio of less than three acres of parkland per 1,000 residents (use the "Park Access Tool" or the "Community Fact Finder".) - o Areas with an annual median household income that is less than \$49,119. • Renovate existing or create new outdoor facilities within existing parks not currently under federal 6(f)(3) protection.	California State Parks	Federal via State	\$2 million	50%	http://www.parks.ca.gov/?page_id=21360 Success Rate: 17 applications were funded. LOD: Medium

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
17	First-come, first-served until 03/31/18 Transportation	MSRC Major Event Center. To facilitate implementation of new or expanded public transportation programs for event center destinations located in the South Coast Air Quality Management District. Eligible Entities include: Major event center, qualifying transportation provider or a County Transportation Commission. Eligible Projects include: • Applicants may propose a maximum of two consecutive event “seasons”. • All bus and shuttle vehicles performing Event Center transportation services under this Program must be equipped with an engine that is certified at - <i>or cleaner than</i> – the EPA 2010 emissions standards and certified as such by the California Air Resources Board. All fuels and technologies certified to the 2010 emissions standards are acceptable. • For projects that propose expanded rail service, the MSRC requires that Tier 4 locomotives be used for all events beginning January 1, 2018. Tier 4 locomotives must also be used, if available, prior to January 1, 2018.	Mobile Source Air Pollution Reduction Review Committee	Regional via State	• \$2.50 million for any single transportation service provider. • \$1,500,000 for any single major event center. • The geographical funding minimum is \$350,000 per county. • Reimbursement grant.	50%	http://www.cleantransportationfunding.org/rfp/view/major-event-center-transportation-program Success Rate: N/A. This is a new program. LOD: Complex

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
18	10/01/18 Housing	Community-Based Transitional Housing. To encourage local communities to support housing that provides treatment and reentry programming to individuals who will benefit from those services. • Applicant must have a licensed partner facility operator. • The facility shall provide, or contract with another provider for, two or more additional services to residents. • Applicant may use program funds for the following purposes: - o Discretionary law enforcement services - o Community outreach efforts • Facility operators may use program funds provided by the applicant for the following purposes: - o Providing facility residents with the services specified in the approved application for program funding. - o Enhancing the security of the facility and its premises. - o Community outreach and communications. - o Start-up costs for the operation of the facility.	California Department of Finance	State	\$2 million	Not required.	http://www.dof.ca.gov/Programs/Local Government/Community Based Transitional Housing/ Success Rate: N/A. This is a new program LOD: Medium

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
**On the Horizon/NOFA not yet released. **							
1	TBD	Volkswagen Settlement Mitigation Trust. \$381 million to California for NOx mitigation. Currently under development	California Air Resource Board	Private	TBD	TBD	https://www.arb.ca.gov/msprog/vw_info/vw-diesel-info/vw-diesel-info.htm
2	Phase 1: October 2017 Phase 2: January 2018 Groundwater Sustainability	Groundwater Sustainability Plans and Projects. To encourage sustainable management of groundwater resources. - Category 1: Severely Disadvantaged Communities (SDAC) Projects - Category 2: Groundwater Sustainability Plans - Tier 1: Critically overdrafted basins. - Tier 2: All other high and medium priority basins.	California Department of Water Resources	State	- Category 1: \$1 million per project. - Category 2 – Tier 1: \$1.5 million per basin. - Category 2 – Tier 2: \$1 million per basin.	50%	http://www.water.ca.gov/irwm/grants/sgrwp/solicitation.cfm
3	Winter 2017/2018 Flood Planning	0 Flood Emergency Response Projects Grant Program. To provide funding for local emergency responders to work with DWR to improve local flood emergency preparedness and response.	California Department of Water Resources	State	TBD	TBD	http://www.water.ca.gov/floodmgmt/funding/flood-ER.cfm

TABLE 2
For Information Purposes Only

****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
4	November 2018 Safety	Kids Plate. To support three significant child health and safety issues in California: 1. Unintentional childhood injuries; 2. Child abuse; and 3. Child care licensing and inspection. This year's focus will be on coalition development.	California Department of Public Health	State	TBD	TBD	https://archive.cdph.ca.gov/programs/Pages/KidsPlate.aspx
5	January 2018 Water Efficiency	Water Conservation Field Services Program – Lower Colorado Region. For activities/projects that make more efficient use of existing water supplies through water conservation and efficiency. • Water management planning; • System Optimization Reviews (SOR); • Designing Water Management Improvements; and Demonstration projects.	Bureau of Reclamation	Federal	\$100,000	50%	http://www.usbr.gov/lc/region/g4000/wtrconsrv.html
6	Call for projects expected 10/13/17 Transportation	• Transit and Intercity Rail Capital Program. Eligible projects include rail and bus capital projects, and operational improvements that result in increased ridership and reduced greenhouse gas emissions.	Caltrans	State	No single project may request more than one-third of the program funds available.	Not required.	http://www.dot.ca.gov/dtrmt/sptirc.html

TABLE 2
For Information Purposes Only
****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
7	January 31, 2018 Roads	SB1 Local Partnership Implementation. Program is under development. Final guidelines are expected October 2017. The guidelines are modeled after the 1B State-Local Partnership program.	Caltrans	State	To be determined.	Dollar for dollar	http://catc.ca.gov/programs/SB1.html
8	February 23, 2018 Planning	2018/19 SB1 Planning Grants. To allocate local planning grants to encourage local and regional planning that furthers state goals, including, but not limited to, the goals and best practices cited in the regional transportation plan guidelines adopted by the commission. Two Planning Grants: • Sustainable Communities Grant Climate Change Adaptation Planning Grant	Caltrans	State	TBD	TBD	http://www.dot.ca.gov/hq/tpp/grants.html
9	March 2018 Freight	Trade Corridor Enhancement Program (CA Freight Investment Program merged with the TCEP). Provides funding for corridor-based freight projects nominated by local agencies and the state. • Guidelines are underdevelopment and expected January 2018	California Transportation Commission	State	TBD	TBD	http://www.catc.ca.gov/activities/sb1/
10	Spring 2018 Trails	Recreational Trails Program. For both non-motorized and motorized RECREATIONAL TRAILS and trail-related facilities. Eligible projects types are: acquisition, development or a combination of acquisition and development.	California State Parks	State	\$50,000 minimum/\$1.5 million maximum	12%	http://www.parks.ca.gov/?page_id=24324

TABLE 2
For Information Purposes Only

****Grants are not eligible for WRCOG grant writing assistance****

No.	Deadline	Name of Grant	Name of Agency/Type	Source of Funds	Maximum Funding	Match Requirement	Website
11	April 2018	Drinking Water for Schools. To improve access to, and the quality of, drinking water in public schools. All projects must be located at schools within, or serving, a DAC. Eligible projects include but are not limited to: • Installation or replacement of water bottle filling stations or drinking water fountains with or without treatment devices capable of removing contaminants present in the school's water supply; • Installation of point-of-entry (POE), or point-of-use (POU) treatment devices for water bottle filling stations, drinking fountains, and other fixtures that provide water for human consumption, including up to three years of: replacement filters, operation and maintenance (O&M), and monitoring of POE or POU devices Installation, replacement, or repairs of drinking water fixtures and associated plumbing appurtenances	State Water Resources Control Board	State	• School: \$25,000/\$100,000 - Entities: \$25,000/\$1 million	TBD	http://www.waterboards.ca.gov/water_issues/programs/grants_loans/schools/
12	June 2018	Transportation • Highway Safety Improvement Grant. To achieve a significant reduction in fatalities and serious injuries on all public roads. All proposed projects must lead to the construction of safety improvements.	Department of Transportation	State	• \$100,000 minimum and \$10 million maximum.	10%	http://www.dot.ca.gov/hq/LocalPrograms/HSIP/applynowHSIP.htm

** Information presented is based on past guidelines. Requirements may change when new guidelines are published or grants may be discontinued.

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Western Riverside Council of Governments Planning Directors' Committee

Staff Report

Subject: Transportation Uniform Mitigation Fee (TUMF) Calculation Handbook Update

Contact: Daniel Ramirez-Cornejo, Senior Analyst, dramirez-cornejo@wrcog.us, (951) 955-8307

Date: October 12, 2017

The purpose of this item is to provide an update to the Committee members on the TUMF Calculation Handbook, for which a draft has been updated to reflect data from the 2016 TUMF Nexus Study.

Requested Action:

1. Receive and file.

WRCOG's Transportation Uniform Mitigation Fee (TUMF) Program is a regional fee program designed to provide transportation and transit infrastructure that mitigates the impact of new growth in Western Riverside County. Each of WRCOG's member jurisdictions and the March JPA participates in the Program through an adopted ordinance, collects fees from new development, and remits the fees to WRCOG. WRCOG, as administrator of the TUMF Program, allocates TUMF to the Riverside County Transportation Commission (RCTC), groupings of jurisdictions – referred to as TUMF Zones – based on the amounts of fees collected in these groups, and the Riverside Transit Agency (RTA).

The TUMF Fee Calculation Handbook details the methodology for calculating the TUMF obligation for different categories of new development and, where necessary, to clarify the definition and calculation methodology for uses not clearly defined in the respective TUMF ordinances.

Background

During the development of the TUMF Program, it was realized that certain land uses require special attention regarding the assessment / calculation of TUMF because of unique, site-specific characteristics. To address these special uses / circumstances, WRCOG developed a Fee Calculation Handbook to detail the methodology for calculating TUMF obligations for different categories of new development and, where necessary, to clarify the definition and calculation methodology for such uses. The fee calculations provide step-by-step work sheets on how fees are calculated for unique uses such as auto dealerships, fueling stations and high cube warehouses. The last update to the Fee Calculation Handbook occurred in early 2017, which included a component for active senior living developments.

In July 2017, the Executive Committee approved the 2016 TUMF Nexus Study, and the TUMF consultant has updated the TUMF Calculation Handbook to reflect the data from the Nexus Study. The draft TUMF Calculation Handbook (attached) also includes an updated pass by ratio for gas stations.

Staff is reviewing the calculation for gas stations in order to streamline the process and avoid any miscalculations of TUMF for these developments. The table below shows the current TUMF obligation for a gas station based on the number of pumps and the assumption that the square footage in any associated building is less than the equivalent square footage of the pumps.

TUMF Calculation for Gas Stations

<u># of Fueling Pumps</u>	<u>Current Square Footage Equivalent</u>	<u>Square Footage Equivalent</u>	<u>3,000 Square Footage Adjustment</u>	<u>Square Footage that is Assessed TUMF</u>	<u>Retail TUMF</u>	<u>TUMF Obligation</u>
2	1691.9	3383.80	-3,000	383.80	\$7.50	\$2,878.50
4	1691.9	6767.60	-3,000	3767.60	\$7.50	\$28,257.00
6	1691.9	10151.40	-3,000	7151.40	\$7.50	\$53,635.50
8	1691.9	13535.20	-3,000	10535.20	\$7.50	\$79,014.00
10	1691.9	16919.00	-3,000	13919.00	\$7.50	\$104,392.50
12	1691.9	20302.80	-3,000	17302.80	\$7.50	\$129,771.00
14	1691.9	23686.60	-3,000	20686.60	\$7.50	\$155,149.50
16	1691.9	27070.40	-3,000	24070.40	\$7.50	\$180,528.00

Staff is requesting that any comments / questions be submitted by October 19, 2017, and it is anticipated that TUMF Calculation Handbook will be reviewed through the WRCOG Committee structure in November and approved by the Executive Committee in December. Participating agencies must continue using the TUMF Calculation Handbook dated October 7, 2015, until the Executive Committee takes action on the updated version in December.

Prior Action:

None.

Fiscal Impact:

Transportation Department activities are included in the Agency's adopted Fiscal Year 2017/2018 Budget under the Transportation Department.

Attachment:

1. Draft TUMF Calculation Handbook.

Item 5.F

Transportation Uniform Mitigation
Fee (TUMF) Calculation Handbook
Update

Attachment 1

Draft TUMF Calculation Handbook

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TRANSPORTATION UNIFORM MITIGATION FEE

FEE CALCULATION HANDBOOK

Prepared for

The Western Riverside Council of Governments

In Cooperation with

The City of Banning
The City of Beaumont
The City of Calimesa
The City of Canyon Lake
The City of Corona
The City of Eastvale
The City of Hemet
The City of Jurupa Valley
The City of Lake Elsinore
The City of Menifee
The City of Moreno Valley
The City of Murrieta
The City of Norco
The City of Perris
The City of Riverside
The City of San Jacinto
The City of Temecula
The City of Wildomar
The County of Riverside
Eastern Municipal Water District
March Joint Powers Authority
Morongo Band of Mission Indians
Western Municipal Water District

Prepared by

WSP

Revised: August 10, 2017



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1.0 INTRODUCTION AND PURPOSE

The Board of Supervisors of the County of Riverside and the Councils of the Cities of Western Riverside County enacted the Transportation Uniform Mitigation Fee to fund the mitigation of cumulative regional transportation impacts resulting from future development. The mitigation fees collected through the TUMF program will be utilized to complete transportation system capital improvements necessary to meet the increased travel demand and to sustain current traffic levels of service.

The fee calculations are based on the proportional allocation of the costs of proposed transportation improvements based on the cumulative transportation system impacts of different types of new development. Fees are directly related to the forecast rate of growth and trip generation characteristics of different categories of new development. The purpose of this handbook is to detail the methodology for calculating the TUMF obligation for different categories of new development and, where necessary, to clarify the definition and calculation methodology for uses not clearly defined in the respective TUMF ordinances.

2.0 STANDARD FEE CALCULATIONS

A standard methodology will be applied for calculating all TUMF obligations based on the rates for various land use categories as prescribed in the respective TUMF ordinances. Fees associated with new residential development are to be calculated based on the prescribed TUMF rate and the total number of dwelling units associated with a new development using **Worksheet A.1.1**. Similarly, fees for all new non-residential developments are to be calculated based on the prescribed TUMF rate and the gross floor area of all buildings associated with the new development using **Worksheet A.2.1**.

2.1. Standard Residential Fee Calculations

For the purpose of calculating the TUMF obligation, residential dwelling units are defined as a building or portion thereof used by one (1) family and containing one (1) kitchen, which is designed primarily for residential occupancy. Residential dwelling units may include, but are not limited to, detached houses, apartment homes, condominiums and mobile homes. Residential dwelling units do not include hotel and motel rooms, dormitories, medical care facilities and correctional institutions which are considered to be non-residential developments.

Residential TUMF obligations are calculated by multiplying the net increase in the total number of dwelling units associated with a new development by the appropriate residential land use category fee rate using **Worksheet A.1.1**. Residential land use categories include single-family residential dwelling units and multi-family dwelling units, as defined in the respective TUMF ordinances.

2.2. Standard Non-Residential Fee Calculations

For the purpose of calculating the TUMF obligation, non-residential development is defined as retail commercial, service commercial, industrial, and government or public sector development which is designed primarily for use as a business and is not intended for residential occupancy or dwelling use. The applicable non-residential land use category for a non-residential development is determined based on the predominate use of the building or structure associated with the new development and may be related to the underlying land use zoning of the new development site, as prescribed in the respective TUMF ordinances. The TUMF non-residential land use categories were defined with reference to the socioeconomic data obtained from the Southern California Association of Governments (SCAG) and used as the basis for completing this Nexus Study analysis. The SCAG employment data is provided for thirteen employment sectors consistent with the California Employment Development Department (EDD) Major Groups including: Farming, Natural Resources and Mining; Construction; Manufacturing; Wholesale Trade; Retail Trade; Transportation, Warehousing and Utilities; Information; Financial Activities; Professional and Business Service; Education and Health Service; Leisure and Hospitality; Other Service; and Government. For the purposes of the Nexus Study, the EDD Major Groups were aggregated to Industrial (Farming, Natural Resources and Mining; Construction; Manufacturing; Wholesale Trade; Transportation, Warehousing and Utilities), Retail (Retail Trade), Service (Information; Financial Activities; Professional and Business Service; Education and Health Service; Leisure and Hospitality; Other Service) and Government/Public Sector (Government). These four aggregated sector types were used as the basis for calculating the fee.

Table 2.1 provides a table detailing the EDD Major Groups and corresponding North American Industry Classification System (NAICS) Categories that are included in each non-residential sector type. Table 2.1 should be used as a guide to determine the applicable non-residential TUMF land use category based on the predominate use of the buildings associated with the new development. A comprehensive breakdown of the Major Groups and correspondence to the NAICS categories can be found in Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017) and on the U.S. Census Bureau website at www.census.gov/epcd/www/naics.html.

Non-residential TUMF obligation are calculated by multiplying the net increase in the gross floor area of the buildings or structures associated with a new development by the appropriate non-residential land use category fee rate using **Worksheet A.2.1**. The gross floor area of non-residential developments is defined as the sum, measured in square feet, of the area at each floor level, including cellars, basements, mezzanines, penthouses, corridors, lobbies, stores, and offices, that are included within the principal outside faces of the exterior wall of the building or structure, not including architectural setbacks or projections. Included are all stories or areas that have floor surfaces with clear standing head room (at least 6 feet, 6 inches) regardless of their use. Where a ground level area, or part thereof, within the principal outside faces of the exterior walls of the building or structure is left un-roofed, the gross floor area of the un-roofed portion will be added to the overall square footage of the building for the purpose of the non-

residential fee calculation unless the unroofed area is solely provided for architectural or aesthetic purposes.

For certain non-residential land use types that have been explicitly defined in this handbook (herein referred to as 'defined use') un-enclosed un-roofed areas and un-enclosed roofed-over spaces that are integral to the performance of the principal business of the site will be added to the overall square footage of any buildings or structures associated with a new development for the purpose of fee calculation. Defined use types are listed in **Table 3.1** of this handbook. Determination of the precise floor area for each defined use will be made in accordance with the provisions of **Section 4.0** and **Section 5.0** of this handbook.

DRAFT

Table 2.1 - TUMF Non-Residential Category Detailed NAICS Correspondence Summary

TUMF	California Employment Development Department (EDD)	North American Industry Classification System (NAICS) (2007)
Category	Major Groups	Category Codes & Descriptions*
Industrial	11-000000 Total Farm	11-111 Crop Production
		11-112 Animal Production
		11-113 Forestry and Logging
		11-114 Fishing, Hunting and Trapping
		11-115 Support Activities for Agriculture and Forestry
	10-000000 Natural Resources & Mining	10-211 Oil and Gas Extraction
		10-212 Mining (except Oil and Gas)
		10-213 Support Activities for Mining
	20-000000 Construction	20-236 Construction of Buildings
		20-237 Heavy and Civil Engineering Construction
		20-238 Specialty Trade Contractors
		32-311 Food Manufacturing
	30-000000 Manufacturing	32-312 Beverage and Tobacco Product Manufacturing
		32-313 Textile Mills
		32-314 Textile Product Mills
		32-315 Apparel Manufacturing
		32-316 Leather and Allied Product Manufacturing
		31-321 Wood Product Manufacturing
		32-322 Paper Manufacturing
		32-323 Printing and Related Support Activities
		32-324 Petroleum and Coal Products Manufacturing
		32-325 Chemical Manufacturing
		32-326 Plastics and Rubber Products Manufacturing
		31-327 Nonmetallic Mineral Product Manufacturing
		31-331 Primary Metal Manufacturing
		31-332 Fabricated Metal Product Manufacturing
		31-333 Machinery Manufacturing
		31-334 Computer and Electronic Product Manufacturing
		31-335 Electrical Equipment, Appliance, and Component Manufacturing
		31-336 Transportation Equipment Manufacturing
		31-337 Furniture and Related Product Manufacturing
		31-339 Miscellaneous Manufacturing
	41-000000 Wholesale Trade	41-423 Merchant Wholesalers, Durable Goods
		41-424 Merchant Wholesalers, Nondurable Goods
		41-425 Wholesale Electronic Markets and Agents and Brokers
	43-000000 Transportation, Warehousing & Utilities	43-221 Utilities
		43-481 Air Transportation
		43-482 Rail Transportation
		43-483 Water Transportation
		43-484 Truck Transportation
		43-485 Transit and Ground Passenger Transportation
		43-486 Pipeline Transportation
		43-487 Scenic and Sightseeing Transportation
		43-488 Support Activities for Transportation
		43-491 Postal Service
		43-492 Couriers and Messengers
		43-493 Warehousing and Storage
Retail	42-000000 Retail Trade	42-441 Motor Vehicle and Parts Dealers
		42-442 Furniture and Home Furnishings Stores
		42-443 Electronics and Appliance Stores
		42-444 Building Material and Garden Equipment and Supplies Dealers
		42-445 Food and Beverage Stores
		42-446 Health and Personal Care Stores
		42-447 Gasoline Stations
		42-448 Clothing and Clothing Accessories Stores
		42-451 Sporting Goods, Hobby, Book, and Music Stores
		42-452 General Merchandise Stores
		42-453 Miscellaneous Store Retailers
		42-454 Nonstore Retailers

**Table 2.1 - TUMF Non-Residential Category Detailed NAICS Correspondence Summary
(continued)**

TUMF	California Employment Development Department (EDD)	North American Industry Classification System (NAICS) (2007)
Category	Major Groups	Category Codes & Descriptions*
Service	50-000000 Information	50-511 Publishing Industries (except Internet)
		50-512 Motion Picture and Sound Recording Industries
		50-515 Broadcasting (except Internet)
		50-517 Telecommunications
		50-518 Data Processing, Hosting and Related Services
		50-519 other Information Services
	55-000000 Finance Activities	55-521 Monetary Authorities-Central Bank
		55-522 Credit Intermediation and Related Activities
		55-523 Securities, Commodity Contracts, and Other Financial Investments and Related Activities
		55-524 Insurance Carriers and Related Activities
		55-525 Funds, Trusts, and Other Financial Vehicles
		55-531 Real Estate
		55-532 Rental and Leasing Services
	60-000000 Professional & Business Services	55-533 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
		60-540 Professional, Scientific, and Technical Services
		60-550 Management of Companies and Enterprises
		60-561 Administrative and Support Services
	65-000000 Educational & Health Services	60-562 Waste Management and Remediation Services
		65-610 Educational Services
		65-621 Ambulatory Health Care Services
		65-622 Hospitals
		65-623 Nursing and Residential Care Facilities
		65-624 Social Assistance
	70-000000 Leisure & Hospitality	70-711 Performing Arts, Spectator Sports, and Related Industries
		70-712 Museums, Historical Sites, and Similar Institutions
		70-713 Amusement, Gambling, and Recreation Industries
		70-721 Accommodation
		70-722 Food Services and Drinking Places
	80 Other Services	80-811 Repair and Maintenance
		80-812 Personal and Laundry Services
		80-813 Religious, Grantmaking, Civic, Professional, and Similar Organizations
		80-814 Private Households
Government/ Public Sector	90-000000 Government	90-910 Federal Government
		90-920 State Government
		90-930 Local Government
Note: * The NAICS Minor Groups and Categories are cross-referenced to the EDD Major Industrial Codes which are used as the basis for the CDR forecasts.		
Sources:	Riverside County Center for Demographic Research (CDR) California Employment Development Department (EDD) US Census Bureau, North American Industry Classification System (NAICS), 2007	

3.0 DEFINED USE TYPE CALCULATIONS

Notwithstanding the provisions of the respective TUMF ordinances, the TUMF Administration Plan, and the standard residential and non-residential fee calculations described in this handbook, there are a number of “defined use” types that are not clearly defined in the respective TUMF ordinances or cannot readily capture the trip making characteristics of the land use based on the number of dwelling units or gross floor area of new development. For these defined use types, this handbook provides the administrative mechanism to clarify the definition of the particular use, and where appropriate, to determine the proportional ‘fair share’ when the trip generation of the use is not directly or wholly associated with the number of dwelling units or gross floor area.

The methodology for determining the proportional “fair share” for the mitigation of the cumulative traffic impacts associated with the “defined uses” will be unique for each land use. However, the fee obligation for each defined use will be calculated based on the standard residential or non-residential fee calculation methodology (described in Section 2.0 of this handbook) using the schedule of fees prescribed in the respective TUMF ordinances.

The defined use types are indicated in **Table 3.1**. The sections following Table 3.1 provide a detailed explanation of each specific defined use, the rationale for the defined use proportional fair share determination and the methodology for calculating the fee obligation for the specific defined use. **Section 4.0** details the calculation methodology for residential defined use types. **Section 5.0** details the calculation methodology for non-residential defined use types and **Section 6.0** outlines calculation worksheets for applicable defined use types.

Table 3.1 – Defined Use Types		
SECTION	DEFINED USE	CALCULATION METHODOLOGY
<i>Residential</i>		Standard residential fee calculation is the net increase in the total number of dwelling units multiplied by the appropriate residential land use category fee rate using Worksheet A.1.1 .
4.1	Mobile Home Parks	Mobile homes to be located in mobile home parks will be calculated as multi-family dwelling units and mobile homes to be located on individual lots will be calculated as single-family dwelling units using Worksheet A.1.1 for standard residential fee calculations.
4.2	Transit Oriented Development	For eligible residential TOD land uses, the TUMF obligation is calculated by multiplying the standard residential TUMF obligation (either single family or multi-family, as appropriate) by the automobile trip reduction factor using the methodology outlined in Worksheet A.1.2 . Documentation including a site plan and location map will be submitted with the development application to demonstrate eligibility of residential land use as TOD.
4.3	Active Senior Living	For eligible senior adult housing (also referred to as Active Senior Living), the TUMF obligation is calculated by multiplying the standard multi-family residential TUMF obligation by the automobile trip reduction factor using the methodology outlined in Worksheet A.1.23 . Documentation including an active senior living qualification checklist will be submitted with the development application to demonstrate eligibility of residential land use as Active Senior Living.

Table 3.1 (continued) – Defined Use Types		
SECTION	DEFINED USE	CALCULATION METHODOLOGY
<i>Non-Residential</i>		Standard non-residential fee calculation in the net increase in the gross floor area of buildings multiplied by the appropriate non-residential land use category fee rate using Worksheet A.2.1 .
5.1	Fuel Filling Stations	For all types of fuel filling stations or facilities with fuel filling positions, the gross floor area will be calculated using Worksheet A.2.2 and the resultant value will be entered as the <i>Total Gross Floor Area for Retail Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.2	Vehicle Dealerships	Vehicle Dealerships will be calculated as a retail use based on the gross floor area of all buildings and structures associated with the dealership using Worksheet A.2.1 for standard non-residential fee calculations.
5.3	Group Quarters	All types of group quarters will be calculated as service uses using Worksheet A.2.1 for standard non-residential fee calculations.
	Congregate Care Facilities and Nursing Homes	For all group quarters specifically used for congregate care (including assisted living facilities) and/or nursing homes, the gross floor area will be calculated using Worksheet A.2.3 and the resultant value will be entered as the <i>Total Gross Floor Area for Service Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.4	Mini-Warehouses and Rental Storage	Mini-Warehouses and Rental Storage (including outdoor rental storage areas) will be calculated using Worksheet A.2.4 and the resultant value will be entered as the <i>Total Gross Floor Area for Industrial Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.5	Golf Courses	Golf Courses will be calculated using Worksheet A.2.5 and the resultant value will be entered as the <i>Total Gross Floor Area for Service Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.6	Wholesale Nurseries	Wholesale Nurseries will be calculated using Worksheet A.2.6 and the resultant value will be entered as the <i>Total Gross Floor Area for Industrial Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.7	Retail Nurseries (Garden Centers)	Retail Nurseries will be calculated using Worksheet A.2.7 and the resultant value will be entered as the <i>Total Gross Floor Area for Retail Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.8	High-Cube Warehouse/Distribution Center	High-Cube Warehouses/Distribution Centers with a minimum gross floor area of 200,000 square feet, a minimum ceiling height of 24 feet and a minimum dock-high door loading ratio of 1 door per 10,000 square feet will be calculated using Worksheet A.2.8 and the resultant value will be entered as the <i>Total Gross Floor Area for Industrial Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.

Table 3.1 (continued) – Defined Use Types		
SECTION	DEFINED USE	CALCULATION METHODOLOGY
5.9	Wineries	Winery size is determined using Worksheet A.2.9. Small wineries will be calculated as an industrial use based on the gross floor area of all buildings associated with the winery using Worksheet A.2.1 for standard non-residential fee calculations. Medium wineries will be calculated using Worksheet A.2.10 and the resultant value will be entered as the <i>Total Gross Floor Area for Industrial Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations. Large Wineries will be calculated using Worksheet A.2.11 and the resultant value will be entered as the <i>Total Gross Floor Area for Industrial Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.
5.10	Electric Vehicle Supply Equipment Charging Stations	All types of publically accessible electric vehicle supply equipment (EVSE) charging stations will be calculated using Worksheet A.2.12 and the resultant value will be entered as the <i>Total Gross Floor Area for Retail Buildings</i> in Worksheet A.2.1 for standard non-residential fee calculations.

4.0 DETAILED METHODOLOGY FOR RESIDENTIAL DEFINED USE TYPES

4.1. Mobile Home Parks

4.1.1. Summary

Mobile homes to be located in mobile home parks will be considered as multi-family dwelling units with the TUMF obligation calculated using **Worksheet A.1.1** for standard residential fee calculations. Notice of the fee obligation will be provided to the mobile home park developer at the time of issuance of the “Mobile Home Park Permit” or equivalent building permit for the installation of site infrastructure including, but not limited to, permanent foundations, and electrical, water and sewer receptacles. The TUMF will be required to be paid in full by the mobile home park developer at the time of final inspection by the appropriate local jurisdiction to authorize utilization of the site for lease to a mobile home owner (which is considered the equivalent to the issuance of a certificate of occupancy).

Mobile homes to be located on individual lots will be considered single-family dwelling units with the TUMF obligation calculated using **Worksheet A.1.1** for standard residential fee calculations.

4.1.2. Detailed Narrative

In accordance with Section 6.1 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), all mobile homes are considered to be single-family dwelling units for the purpose of calculating the applicable TUMF obligation for newly developed units. Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) defines single-family detached housing as “all single-family detached homes on individual lots” and notes that “single-family detached units had the highest trip generation per dwelling unit of all residential uses, because they were the largest units in size and had more residents and more vehicles per unit than other residential land uses; they were generally located farther away from shopping centers, employment areas, and other trip attractors than other residential land uses; and they generally had fewer alternative modes of transportation available, because they were typically not as concentrated as other residential land uses.” Mobile homes located on individual lots are generally consistent with this description of single-family detached housing and tend to reflect single-family trip generation characteristics and resultant transportation system impacts. However, mobile homes grouped in higher density mobile home parks tend to demonstrate trip generation characteristics more like those of multi-family residential unit developments. For this reason, it has been determined that mobile homes expressly located in mobile home parks will be considered as multi-family dwelling units for the purpose of calculating the applicable TUMF obligation.

Trip Generation 9th Edition defines mobile home parks as generally consisting of multiple “manufactured homes that are sited and installed on permanent foundations and

typically have community facilities such as recreation rooms, swimming pools, and laundry facilities” provided for the exclusive use of residents. Foundations (and associated utilities) in mobile home parks are generally provided on a ‘for lease’ basis to residents who own the actual mobile home with the mobile home being temporarily located on the foundation for the duration of the lease. For the purpose of the TUMF, *mobile homes to be located in mobile home parks* meeting this description *will be considered as multi-family dwelling units* with the fee obligation for newly developed units to be determined accordingly. *Mobile homes to be located on individual lots will be considered single-family dwelling units* with the fee obligation remaining unchanged from that previously prescribed in the Nexus Study and subsequently adopted local ordinances.

For the exclusive purpose of assessing the TUMF on newly developed mobile home parks or expansions of existing mobile home parks that result in an increase in the number of mobile home sites provided within the mobile home park, notice of the fee obligation will be provided to the mobile home park developer at the time of issuance of the ‘Mobile Home Park Permit’ or equivalent building permit for the installation of site infrastructure including, but not limited to, permanent foundations, and electrical, water and sewer receptacles. The TUMF will be required to be paid in full by the mobile home park developer at the time of final inspection by the appropriate local jurisdiction to authorize utilization of the site for lease to a mobile home owner (which is considered the equivalent to the issuance of a certificate of occupancy).

Mobile home parks sites that have received final inspection prior to the enactment of the respective local jurisdictions TUMF Ordinance are considered to be pre-existing. There is no TUMF fee obligation for pre-existing mobile home park sites.

Community facilities such as recreation rooms, swimming pools, and laundry facilities are considered to be ancillary to the primary multi-family residential land use of mobile home parks. The development or expansion of these types of ancillary community facilities would not require payment of TUMF fees. However, the development of non-residential retail, service or industrial facilities (including, but not limited to, convenience markets, management offices and sales offices) in conjunction with a mobile home park would be considered as separate land uses and would require payment of the TUMF fee in accordance with Section 6.2 of the Nexus Study and the provisions of the respective local TUMF Ordinance.

4.2. Transit-Oriented Development

4.2.1. Summary

As described in the California Mitigation Fee Act, a transit-oriented development (TOD) is “a development project consisting of residential use or mixed use where not less than 50 percent of the floorspace is for residential use...if located within ½ mile of a transit station and with direct walking access to the station, within ½ mile of convenience retail uses including a store that sells food, and with a maximum number of parking spaces as required by state statute or local ordinance.”

For the purpose of calculating the TUMF obligation, a factor reflecting the reduction in automobile trip generation associated with residential TOD will be applied to the standard residential TUMF obligation.

The residential TOD TUMF obligation is calculated by multiplying the standard residential TUMF obligation (either single family or multi-family, as appropriate) by the automobile trip reduction factor. The methodology outlined in **Worksheet A.1.2** and described as follows will be applied to determine the TOD TUMF obligations.

1. Complete the TOD qualification checklist and prepare TOD documentation.
2. Determine the standard TUMF obligation for eligible residential TOD land uses using **Worksheet A.1.1**.
3. Multiply the result for Step 2 by 0.885.

Documentation will be submitted with the development application as the basis for determining the eligibility of the residential land use as a TOD. Documentation will include a site plan indicating that at least 50% of the floorspace of the development is dedicated to residential use and the required number of parking spaces associated with the subject development. Documentation will also include a map showing the location of the subject development circled with a ½ mile radius, as well as the location of a transit station(s), the location of diverse uses and direct walking routes of ½ mile or less between the subject development and the listed uses to justify that the development satisfies the characteristics of TOD.

4.2.2. Detailed Narrative

The California Mitigation Fee Act requires that impact fees for residential development that satisfy certain characteristics of transit-oriented development (TOD) “be set at a rate that reflects a lower rate of automobile trip generation associated with such housing developments in comparison with housing developments without these characteristics.”

Section 66005.1 of the California Government Code (Mitigation Fee Act) states the following with regard to Transit-Oriented Development and impact fees:

“(a) When a local agency imposes a fee on a housing development pursuant to Section 66001 for the purpose of mitigating vehicular traffic impacts, if that housing development satisfies all of the following characteristics, the fee, or the portion thereof relating to vehicular traffic impacts, shall be set at a rate that reflects a lower rate of automobile trip generation associated with such housing developments in comparison with housing developments without these characteristics, unless the local agency adopts findings after a public hearing establishing that the housing development, even with these characteristics, would not generate fewer automobile trips than a housing development without those characteristics:

- (1) The housing development is located within one-half mile of a transit station and there is direct access between the housing development and the transit station along a barrier-free walkable pathway not exceeding one-half mile in length.*

(2) Convenience retail uses, including a store that sells food, are located within one-half mile of the housing development.

(3) The housing development provides either the minimum number of parking spaces required by the local ordinance, or no more than one onsite parking space for zero to two bedroom units, and two onsite parking spaces for three or more bedroom units, whichever is less.

(b) If a housing development does not satisfy the characteristics in subdivision (a), the local agency may charge a fee that is proportional to the estimated rate of automobile trip generation associated with the housing development.

(c) As used in this section, "housing development" means a development project with common ownership and financing consisting of residential use or mixed use where not less than 50 percent of the floorspace is for residential use.

(d) For the purposes of this section, "transit station" has the meaning set forth in paragraph (4) of subdivision (b) of Section 65460.1. "Transit station" includes planned transit stations otherwise meeting this definition whose construction is programmed to be completed prior to the scheduled completion and occupancy of the housing development.

With regard to the definition of transit station, Section 65460.1 of the California Government Code (Transit Village Development Plan Act) states that *the following definitions shall apply:*

(1)"Bus hub" means an intersection of three or more bus routes, with a minimum route headway of 10 minutes during peak hours.

(2)"Bus transfer station" means an arrival, departure, or transfer point for the area's intercity, intraregional, or interregional bus service having permanent investment in multiple bus docking facilities, ticketing services, and passenger shelters.

[...]

(5)"Transit station" means a rail or light-rail station, ferry terminal, bus hub, or bus transfer station."

Research regarding the relationship between automobile trips and TOD is summarized in Table 4.1. Table 4.1 indicates the lower automobile trip generation rates that have been determined to be associated with TOD compared to conventional developments.

Table 4.1 – Examples of Automobile Trip Reduction Rates	
<i>Situation</i>	<i>Automobile Trip Reduction Rate</i>
Housing development within 2,000 ft of a light-rail or commuter rail station ¹	9%
Housing development in settings with intensive transit services ²	15%
Housing or business TOD ³	2 - 16%
TOD housing in California ³	15%
Average trip reduction rate (if the case study indicates a range the average rate was used)	11.5%

Sources

1: Santa Clara County Congestion Management Agency

2: California Air Resource Board study; Parker et al.; 2002

3: Effects of TOD on housing, parking, and travel; R. Cervero et al.; TCRP report 128; 2008

The California Air Resources Board, which estimates the air quality impacts of new developments, calls for up to a 15 percent reduction in trip rates for housing in settings with intensive transit services. The Santa Clara County California's Congestion Management Agency recommends a 9 percent trip reduction in estimated trip generation levels when setting impact fees for new housing developments within 2,000 feet of a light-rail or commuter-rail station. Studies also found that mode shifts and automobile trip reductions are more noticeable in areas where transit use is already high.

Those studies also found wide variations between automobile trip reduction rates from development to development, depending on several factors such as housing density, proximity to downtown, or intensity of transit service. For instance, a 2003 California TOD travel characteristics study found that commute shares of residents living within ½ mile of a transit station strongly differ from the shares of those living outside the station-area. The statewide weighted average difference in transit shares compared against the surrounding ½ mile to 3 miles was nearly 27 percent inside the ½ mile radius and 7 percent outside.

Based on case studies and considering the relatively low housing density in Western Riverside County, as well as the intensity of transit service, an average automobile trip reduction rate of 11.5% will be used to calculate the TUMF obligation for TODs as described in the California Mitigation Fee Act.

The U.S. Green Building Council (USGBC), the Congress for the New Urbanism (CNU), and the Natural Resources Defense Council (NRDC) have developed a national standard for assessing and rewarding environmentally superior neighborhood development practices within the framework of the Leadership in Environmental and Energy Design (LEED®) Green Building Rating System™. As stated in *LEED 2009 for Neighborhood Development Rating System* (USGBC, April 2012), LEED for Neighborhood Development “places emphasis on the site selection, design, and construction elements that bring buildings and infrastructure together into a neighborhood and relate the neighborhood to its landscape as well as its local and regional context. LEED for Neighborhood Development creates a label, as well as guidelines for both decision

making and development, to provide an incentive for better location, design, and construction of new residential, commercial, and mixed-use developments.”

LEED Neighborhood Development (LEED ND) Certification utilizes three environmental categories: Smart Location and Linkage, Neighborhood Pattern and Design, and Green Infrastructure and Buildings. The Smart Location and Linkage (SLL) is consistent with the principles of TOD having the intent described as follows:

- “To encourage development within and near existing communities and public transit infrastructure.
- To encourage improvement and redevelopment of existing cities, suburbs, and towns while limiting the expansion of the development footprint in the region to appropriate circumstances.
- To reduce vehicle trips and vehicle miles traveled (VMT).
- To reduce the incidence of obesity, heart disease, and hypertension by encouraging daily physical activity associated with walking and bicycling.”

In order to achieve LEED ND certification, a prerequisite is meeting the requirements of SLL. A requirement of SLL directly applicable to TOD and mixed use is locating a “project near existing neighborhood shops, uses, and facilities collectively referred to as “diverse uses” such that the ... project’s geographic center is within 1/2-mile walk distance of at least seven diverse uses.” This SLL requirement and LEED ND prerequisite provides an appropriate measure for determining a development meets national standards for mixed use in the context of TOD. Although the California Mitigation Fee Act specifically cites the requirement to be located in proximity to Convenience Retail uses, the LEED ND SLL diverse uses requirement will be utilized by WRCOG as the basis for determining that a development application meets the mixed use requirements of a TOD to adequately reduce trip generation rates.

Documentation of TOD that must be submitted with the development application as the basis for determining the TUMF fee obligation consists of the following:

1. Site Plan including a table or narrative detailing that not less than 50% of the total floorspace of the planned development is dedicated for residential use, and indicating the number of parking spaces associated with the subject development does not exceed the minimum number of parking spaces required by the local ordinance, or no more than one onsite parking space for zero to two bedroom units, and two onsite parking spaces for three or more bedroom units, whichever is less.
2. Location Map showing the location of the subject development circled with a ½ mile radius, as well as the location of a transit station(s), the location of diverse uses and direct walking routes of ½ mile or less between the subject development and the listed uses. The map must also indicate the pedestrian connectivity from the development to a transit station and the other diverse use locations along a barrier-free walkable pathway not exceeding ½ mile.

At least seven diverse uses from the list in Table 4.2 must be identified within a ½ mile walking distance of the development to qualify a TOD. The qualifying diverse uses must include at least one Food Retail establishment and at least one use from each of two other categories. A single establishment may be counted as having more than one diverse use when separate and distinct uses within the establishment fall within different categories. For example, a supermarket (Food Retail category) may also include a pharmacy (Community-Serving Retail category) and a bank (Services category) providing a total of three diverse uses in a single establishment.

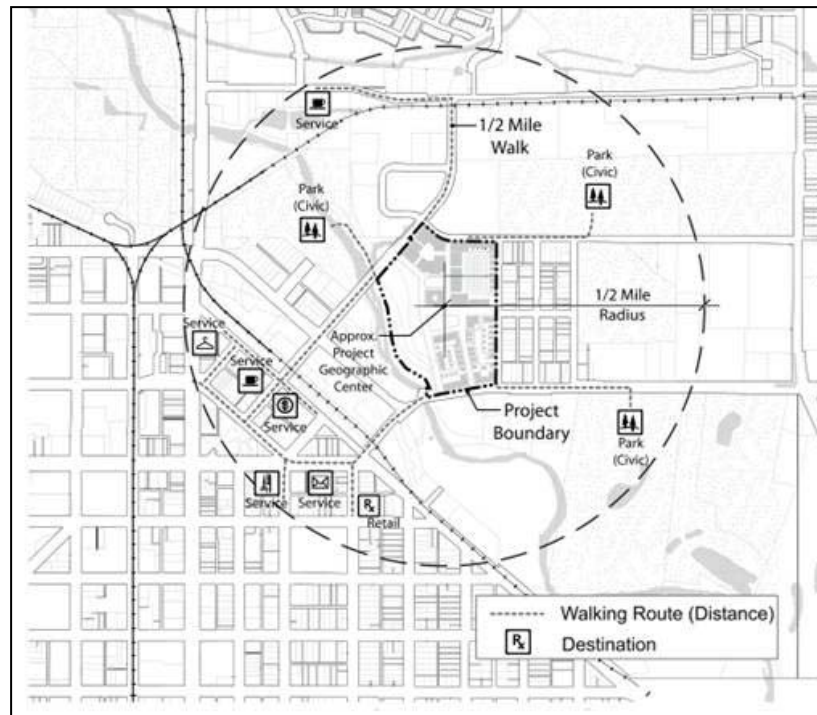
Table 4.2 – List of Diverse Uses¹

Category	Use
Food Retail	Supermarket
	Other food store with produce
Community-Serving Retail	Clothing store or department store selling clothes
	Convenience store
	Farmer's market
	Hardware store
	Pharmacy
	Other retail
Services	Bank
	Gym, health club, exercise studio
	Hair care
	Laundry, dry cleaner
	Restaurant, café, diner (excluding establishments with only drive-throughs)
Civic and Community Facilities	Adult or senior care (licensed)
	Child care (licensed)
	Community or recreation center
	Cultural arts facility (museum, performing arts)
	Educational facility (including K–12 school, university, adult education center, vocational school, community college)
	Family entertainment venue (theater, sports)
	Government office that serves public on-site
	Place of worship
	Medical clinic or office that treats patients
	Police or fire station
	Post office
	Public library
	Public park
	Social services center

Figure 4.1 depicts a sample map of how the Walkability Assessment and Map of Diverse Uses may be presented to meet the requirements.

¹ Adapted from LEED 2009 for Neighborhood Development Rating System, updated April 2012, USGBC

Figure 4.1 – Walkability Assessment and Map of Diverse Uses within ½ mile of Development



The TUMF residential use obligation for a TOD is 88.5% of the standard residential use obligation for a similar development. This rate will be evaluated and updated in conjunction with the regular updates of the TUMF Nexus Study to respond to changes in housing density and transit service in Western Riverside County.

4.3. Active Senior Living

4.3.1. Summary

Senior adult housing (also commonly referred to as “active senior living”) is generally defined in the Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) as detached and/or detached housing units in independent living developments, including retirement communities, age-restricted housing and active adult communities, that may include amenities such as golf courses, swimming pools, 24-hour security, transportation, and common recreational facilities, but generally lack centralized dining and on-site health facilities. Residents in active senior living communities live independently and are typically active (requiring little to no medical supervision), which differs from congregate care facilities (including senior assisted living facilities) and nursing homes that are specific types of group quarters (as described in **Section 5.3**) whose primary function is to provide care for elderly persons or other persons who are unable to adequately care for themselves.

Both detached and attached senior adult housing are typically built in higher density sole purpose developments with age restrictions or limitations on residents. As such, active senior living housing units typically demonstrate trip generation rates significantly below those of standard single-family and multi-family residential unit developments. Furthermore, according to Trip Generation 9th Edition, the trip generation rates for detached and attached dwelling units in active senior housing units are very similar, and more closely reflect the trip generation rates of multi-family dwelling units. For this reason, all dwelling units in eligible active senior living developments (both detached and attached) regardless of density are considered multi-family dwelling units for the purpose of calculating the applicable TUMF obligation.

For the purpose of determining the TUMF obligation, all dwelling units in eligible active senior living developments (both detached and attached) regardless of density will be considered multi-family dwelling units. The methodology outlined in **Worksheet A.1.3** and described as follows will be applied to determine the equivalent number of multi-family dwelling units for all types of active senior living dwelling units.

4. Complete the active senior living qualification checklist and provide the required supporting documentation pursuant to Cal. Civ. Code § 51.11 and Cal. Bus. & Prof. Code § 11010.05 [2016].
5. Multiply the total number of eligible active senior living dwelling units (both detached and attached) by 0.53 to determine the equivalent number of multi-family dwelling units
(i.e. for the example facility it is $413 \times 0.53 = 218.9$ equivalent multi-family dwelling units)
6. Use the resultant value as the number of multi-family dwelling units to calculate the TUMF obligation using **Worksheet A.1.1** for standard residential fee calculations.

4.3.2. Detailed Narrative

Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) includes two separate definitions for senior adult housing (commonly referred to as “active senior living”). Detached senior adult housing is defined as “detached independent living developments, including retirement communities, age-restricted housing and active adult communities. These developments may include amenities such as golf courses, swimming pools 24-hour security, transportation, and common recreational facilities. However, they generally lack centralized dining and on-site health facilities. Detached senior communities may or may not be gated.” Attached senior adult housing is similar to detached senior housing, “except they contain apartment-like residential units. Attached senior adult housing may include limited social and recreational services, but typically lacks centralized dining or medical facilities.” In both types of active senior living dwelling units, residents “live independently and are typically active (requiring little to no medical supervision)”, which differs from congregate care facilities (including senior assisted living facilities) and nursing homes that are specific types of group quarters (as described in **Section 5.3**) whose primary function is to provide care for elderly persons or other persons who are unable to adequately care for themselves.

Both detached and attached senior adult housing are typically built in higher density sole purpose developments with age restrictions or limitations on residents. As shown in **Table 4.3**, active senior living housing units typically demonstrate trip generation rates significantly below those of standard single-family and multi-family residential unit developments. Furthermore, according to Trip Generation 9th Edition, the trip generation rates for detached and attached dwelling units in active senior housing units are very similar, and more closely reflect the trip generation rates of multi-family dwelling units. For this reason, all dwelling units in eligible active senior living developments (both detached and attached) regardless of density are considered multi-family dwelling units for the purpose of calculating the applicable TUMF obligation.

Section 51.11 of the California Civil Code (Cal. Civ. Code § 51.11) defines a senior citizen housing development specifically in Riverside County as “a residential development developed with more than 20 units as a senior community by its developer and zoned as a senior community by a local governmental entity, or characterized as a senior community in its governing documents.” Additionally, Section 11010.05 of the 2016 California Business and Professions Code (Cal. Bus. & Prof. Code § 11010.05 [2016]) elaborates that any “person who proposes to create a senior citizen housing development, as defined in Section 51.3 or 51.11 of the Civil Code, shall include in the application for a public report a complete statement of the restrictions on occupancy that are to be applicable in the development. Any public report issued for a senior housing development shall also include a complete statement of the restrictions on occupancy to be applicable in the development.” To demonstrate a development qualifies as active senior living for the purposes of determining the TUMF obligation, applicants will be required to provide copies of local government zoning and/or governing documents, and the public report statement developed pursuant to Cal. Civ. Code § 51.11 and Cal. Bus. & Prof. Code § 11010.05 [2016], respectively.

In accordance with Section 6.1 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), and as discussed previously, both detached and attached senior adult housing, regardless of density, will be considered to be multi-family dwelling units for the purpose of calculating the applicable TUMF obligation. The TUMF obligation for multi-family (and all residential) land uses is based on the total number of dwelling units associated with the specific development and is calculated using **Worksheet A.1.1** for standard residential fee calculations. However, in the case of active senior living communities, vehicle trips generated to and from the site are typically lower than standard residential uses due to the age of the residents (who are typically retired from full time employment) and the provision of various ancillary recreational and entertainment amenities within the community. For this reason, it is necessary to determine the multi-family dwelling unit equivalency for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition indicates the weekday average daily vehicle trip generation rate for detached senior adult housing is 3.68 trips per dwelling unit, while the rate for attached senior adult housing is 3.44 trips per dwelling unit (an average of 3.56 daily trips per dwelling unit). By comparison, standard multi-family uses have a

weekday daily trip generation rate of 6.72 trips per dwelling unit. **Table 4.3** summarizes the various characteristics of senior active living, including trip generation rates, and establishes the equivalent multi-family dwelling units for the purpose of calculating the TUMF obligation for all senior active living dwelling units.

Table 4.3 – Characteristics of Senior Adult Housing in Active Senior Living Developments			
<i>Land Use Type (ITE Code)</i>	<i>Average Number of Dwelling Units</i>	<i>Average Daily Vehicle Trips per Dwelling Unit</i>	<i>TUMF Weighted Equivalent Multi-family Dwelling Unit*</i>
<i>Senior Adult Housing - Detached (251)</i>	780	3.68	
<i>Senior Adult Housing - Attached (252)</i>	46	3.44	0.53
<i>Median All TUMF Multi- Family Use Types</i>		6.72	

Source: [Trip Generation 9th Edition](#), Institute of Traffic Engineers, 2012

Note: * - TUMF weighted equivalent multi-family dwelling units based on relative trip generation per dwelling unit for adult senior living and all TUMF multi-family use types.

The multi-family dwelling unit equivalency for active senior living dwelling units is based on the comparison of average daily trip generation characteristics for detached and attached senior adult housing as defined in the Trip Generation Manual in terms of trips per dwelling unit, and the median trip generation rate for all TUMF multi-family dwelling unit types. Based on this information, each active senior housing dwelling unit represents the equivalent of 0.53 multi-family dwelling units in terms of the relative trip generation rate.

For the purpose of calculating the TUMF obligation for *all types of qualifying active senior living dwelling units*, the total number of qualifying dwelling units in the development will be multiplied by 0.53 to determine the equivalent number of multi-family dwelling units. *The equivalent multi-family dwelling units will be used for the purpose of calculating the TUMF at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.*

Application of this methodology will account for variations in the trip generation rates of senior active living dwelling units and standard multi-family dwelling units. For example, an average active senior living community with 413 detached and/or attached dwelling units would have the equivalent of 218.9 multi-family dwelling units (413 x 0.53).

Community facilities, including, but not limited to, recreation rooms, swimming pools, laundry facilities, security gatehouses, storage rooms, garages and maintenance buildings, that are provided for the sole and exclusive use of community residents (and their permitted guests) are considered to be ancillary to the primary multi-family residential land use of active senior living developments, and through their availability contribute to the lower trip generation rates observed. The development or expansion

of these types of ancillary community facilities would not require separate payment of TUMF fees. However, the development of non-residential retail, service or industrial facilities (including, but not limited to, convenience markets, club houses, management offices and sales offices) that are developed conjunction with an active senior living community but are not limited to the sole and exclusive use of community residents (and their guests) and are available for use by or accessible to the general public would be considered as separate land uses and would require payment of the TUMF fee in accordance with Section 6.2 of the Nexus Study and the provisions of the respective local TUMF Ordinance.

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5.0 DETAILED METHODOLOGY FOR NON-RESIDENTIAL DEFINED USE TYPES

5.1. Fuel Filling Stations (Gasoline/Service Stations)

5.1.1. Summary

For the purpose of calculating the TUMF obligation, all types of fuel filling stations or facilities with fuel filling positions will be considered retail use types (for electric vehicle charging stations see Section 5.10). The methodology outlined in **Worksheet A.2.2** and described as follows will be applied to determine the gross floor area for calculating the TUMF obligation for all types of fuel filling stations or facilities with fuel filling positions (*for the example calculation assume a fuel filling station with 12 fuel filling positions and a building area of 1,250 square feet*). The total number of fuel filling positions is equal to the maximum number of vehicles that could be supplied with fuel at the same time.

1. Multiply the total number of fuel filling positions by 1,403.8 square feet (*i.e. for the example station it is $12 \times 1,403.8 = 16,846$ square feet*)
2. Determine the total floor area of buildings on the site noting that the canopy area is not included as part of the gross floor area of the buildings on the site (*i.e. for the example station it is 1,250 square feet*)
3. Compare the results for steps 1 and 2, and use the greater of the two values as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations. (*i.e. $16,846 > 1,250$; for the example station TUMF would be calculated for 16,846 square feet*)

5.1.2. Detailed Narrative

Fuel filling stations (also referred to as gasoline stations or service stations) include all retail land uses where the primary business of the site is the fueling of motor vehicles. Fuel filling stations may also incorporate convenience markets, car washes, facilities for servicing and repairing motor vehicles and “express” fast food services. By contrast, fuel pumps may be provided as an ancillary use to a convenience market where the primary business of the site is the selling of convenience items and not the fueling of motor vehicles. Electric vehicle charging stations are not considered fuel filling stations. See Section 5.10 for the fee calculation methodology related to electric vehicle charging stations.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), fuel filling stations are considered to be retail uses for the purpose of calculating the applicable TUMF obligation for newly developed facilities or expansions of existing facilities. The TUMF for retail (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use. However, in the case of fuel filling stations, the canopy area is not included as part of the gross floor area of the buildings on the site as it is considered to be an un-enclosed roofed over area in accordance with the definition for non-residential gross floor area

provided in **Section 2.2**. Vehicle trips to and from the site are generated primarily by the fuel filling positions (pumps) and in some cases only very limited building gross floor area is associated with the fuel filling station. For this reason, it is necessary to determine the gross floor area equivalency per fueling position for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates a total of four (4) retail land use types that represent fuel filling stations or retail facilities with fuel filling positions. For three of the four land use types, fuel of motor vehicles represents the primary business of the site. These land use types are designated as “Gasoline/Service Stations” without or with ancillary services. The remaining land use type is designated as “Convenience Market with Gasoline Pumps” where fueling of motor vehicles is considered incidental to the primary business of the site, which is the selling of convenience items.

According to the Trip Generation Manual, Gasoline/Service Stations are characterized by an average of 8 to 12 fueling positions that may be accompanied by ancillary facilities including limited automotive repair facilities, a small convenience market, fast food services and/or car wash. In the case of Gasoline/Service Stations with a Convenience Market, the average gross floor area of buildings is approximately 1,000 square feet. Average daily trip generation per fueling position for all Gasoline/Service Stations ranged from 152.84 to 168.56. The relatively small variation in average daily trips per fueling position between Gasoline/Service Stations either without or with ancillary facilities clearly demonstrates that the primary trip generation factor (and business) of the site is the provision of the fuel filling positions.

By contrast, Convenience Markets with Gasoline Pumps have an average of 4 fuel filling positions and approximately 3,000 square feet of gross floor area. This represents less than ½ of the average number of filling positions at Gasoline/Service Stations, and over twice the average gross floor area of Gasoline/Service Stations with Convenience Market. These characteristics clearly differentiate between Gasoline/Service Stations and Convenience Markets with Gasoline Pumps. This differentiation is also reflected in the average daily trip generation per fueling position which is 542.60 for a Convenience Market with Gasoline Pumps, over three times the generation rate for Gasoline/Service Stations. The difference is a direct product of the additional trips generated by the primary use of the site being the selling of convenience items at the Convenience Market, and not the ancillary sale of fuel for motor vehicles.

Table 5.1 summarizes the various characteristics of fuel filling stations, including trip generation. The table also details the calculation of the gross floor area equivalency per fueling position.

The gross floor area equivalency per fueling position for Gasoline/Service Stations is based on the trip generation characteristic of Gasoline/Service Stations with Convenience Market which is quantified in the Trip Generation Manual in terms of both trips per fuel filling position and thousands of square feet of gross floor area. Based on this information each fuel filling position at a Gasoline/Service Station represents the equivalent of 137.5 square feet of gross floor area. To account for the variation in trip

generation rates between Gasoline/Service Stations and all TUMF retail land use types, the gross floor area equivalency per fueling position was weighted based on the relative trip generation between Gasoline/Service Stations and the median of all TUMF Retail Uses as used in the TUMF Nexus Study. This weighted equivalency was then reduced by 56.0% to account for pass by trips to ensure consistency with the TUMF Nexus Study Trip Generation Rate Comparison. The weighted gross floor area equivalency per fueling position for Gasoline/Service Stations is 1403.8.

Land Use Type	Average Fueling Positions	Average Gross Floor Area (1000 sqft)	Average Daily Vehicle Trips per Fueling Position	Average Daily Vehicle Trips per 1,000 sqft	Pass By Trips (PM Peak Hour)	Equivalent Fueling Positions per 1,000 sqft	Equivalent sqft per Fueling Position	TUMF Weighted Equivalent sqft per Fueling Position**
Gasoline/Service Station without Convenience Market (944)	8		168.56					
Gasoline/Service Station with Convenience Market* (945)	12	1	162.78	1,184.26	56%	7.28	137.5	1,403.8
Gasoline/Service Station with Convenience Market and Car Wash (946)	12		152.84					
Convenience Market with Gasoline Pumps (853)	4	3	542.60	845.60	66%	1.56	641.7	
Median of All TUMF Retail Use Types				51.02	42%			

Source: [Trip Generation 9th Edition](#), Institute of Traffic Engineers, 2012

Note: ** - Average Daily Trips per 1,000 sqft based on interpolation of vehicle trips per fueling position and vehicle trips per 1,000 sqft for AM Peak Hour of Generator and PM Peak Hour of Generator relative to the Average Daily Trips per Fueling Position. The resultant interpolated values derived from the AM Peak Hour and PM Peak Hour, respectively, were then averaged to determine the Average Daily Trips per 1,000 sqft.

*** - TUMF weighted equivalent a square feet based on equivalent square feet per fueling position adjusted to reflect relative trip generation between Gasoline/Service Station and all TUMF Retail Uses, and reduced to account for pass by trips (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

For the purpose of calculating the TUMF obligation for *all types of fuel filling stations*, the total number of fuel filling positions will be multiplied by 1,403.8 to determine the equivalent number of square feet of floor area, with the total number of fuel filling positions being equal to the maximum number of vehicles that could be supplied with fuel at the same time. The *equivalent floor area will be compared to the actual building gross floor area* for the site (the canopy area is not included as part of the gross floor area of the buildings on the site), and the *greater of the two floor areas will be used for the purpose of calculating the TUMF* at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.

Application of this methodology will account for variations in the type of fuel filling station, and in particular the primary business of the site. For example, an average Gasoline/Service Station with Convenience Market (12 filling stations and 1,247 square

feet of gross floor area) would have an equivalent floor area of 16,846 square feet (12 x 1,403.8). A comparison of the equivalent floor area and actual building gross floor area indicates that the equivalent floor area is greater than the actual floor area (16,846 > 1,247) which is consistent with the primary business of the site (fueling of motor vehicles) and therefore would be used as the basis for calculating the TUMF obligation.

5.2. Vehicle Dealerships (New and Used Vehicle Sales)

5.2.1. Summary

For the purpose of determining the TUMF obligation, all vehicle dealerships are considered to be retail use types. TUMF obligation for Vehicle Dealerships will be calculated based on the gross floor area of all buildings associated with the dealership, including all vehicle sales, parts sales, service areas, administrative offices and waiting areas, using **Worksheet A.2.1** for standard non-residential fee calculations.

5.2.2. Detailed Narrative

Vehicle dealerships include all retail land uses where the primary business of the site is the sale of new or used vehicles including but not limited to cars, pick-ups, sport utility vehicles, motorcycles, trucks, boats and recreational vehicles. Vehicle leasing, rental, servicing and parts sales may also be associated with vehicle dealerships.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), all vehicle dealerships are considered to be retail uses for the purpose of calculating the applicable TUMF obligation for newly developed facilities or expansions of existing facilities. The TUMF for retail (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates consideration of a single classification of Vehicle Dealerships (New Car Sales (841)) for the purpose of determining trip generation rates. For New Car Sales, trip generation rates are provided per employee and per 1000 square feet, with no specific consideration given for outdoor vehicle storage or sales areas.

According to the Trip Generation Manual, New Car Sales are characterized by an average gross building floor area of 34,000 square feet, including facilities for new and used automobile and truck sales and leasing, vehicle services and parts sales. The Trip Generation Manual indicates an average weekday trip generation rate of 32.30 trips per thousand square feet for New Car Sales. The New Car Sales weekday trip generation rate per thousand square feet (and per employee) was included in the range of trip generation rates used to calculate the ITE Average Trip Generation Rate for the purpose of calculating the retail component of the TUMF. The New Car Sales weekday trip generation rate is comparable to the median trip generation rate of 51.02 for all retail uses considered for the calculation of the retail TUMF component.

The Trip Generation Manual clearly demonstrates that the calculation of Vehicle Sales trip generation rates on the basis of actual gross building area is consistent with the relationship of other retail land use type build floor areas to trip generation rates. Therefore, it is not considered necessary to explicitly consider outdoor storage or sales areas for Vehicle Dealerships in the calculation of trip generation. Furthermore, since the external storage and sales areas are not integral to the trip generation characteristics of a Vehicle Dealership, the calculation of the TUMF obligation for Vehicle Dealerships will be based exclusively on the gross floor area of all buildings associated with the dealership, including all vehicle sales, parts sales, service areas, administrative offices and waiting areas.

5.3. Group Quarters

5.3.1. Summary

Group quarters include, but are not limited to, correctional facilities, nursing homes, mental hospitals, college dormitories, military barracks, group homes, missions and shelters. Group quarters typically provide a group of rooms with shared living quarters for unrelated persons. Occupants of group quarters live and eat together with other persons in the building sharing at a minimum communal kitchen, dining and living facilities.

All group quarters will be considered non-residential service use types. The TUMF obligation for group quarters will be calculated using **Worksheet A.2.1** for standard non-residential fee calculations. The methodology outlined in **Worksheet A.2.3** and described as follows will be applied to determine the gross floor area for those group quarters specifically used only for congregate care (including assisted living) and/or nursing homes.

1. Multiply the total number of beds by 81.1 square feet (i.e. for 120 beds it is $120 \times 81.1 = 9,732$ square feet)
2. Use the resultant value as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

5.3.2. Detailed Narrative

The U.S. Census Bureau defines a housing unit as “a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied as separate living quarters. Separate living quarters are those in which the occupants live and eat separately from any other persons in the building and which have direct access from the outside of the building or through a common hall. The occupants may be a single family, one person living alone, two or more families living together, or any other group of related or unrelated persons who share living arrangements.”

The U.S. Census Bureau classifies all people not living in housing unit as living in group quarters. Group quarters include both institutional and non-institutional facilities. Institutional group quarters include, but are not limited to, correctional facilities, nursing homes, and mental hospitals. Non-institutional group quarters include, but are not

limited to, college dormitories, military barracks, group homes, missions and shelters. Group quarters typically provide a group of rooms with shared living quarters for unrelated persons. Occupants of group quarters live and eat together with other persons in the building sharing at a minimum communal kitchen, dining and living facilities.

The issue of classifying group quarters for calculating the TUMF obligation is obscured by the definition of 'residential dwelling units' for the purpose of the TUMF. As indicated in **Section 2.1**, for the purpose of calculating the TUMF obligation, residential dwelling units are defined as a building or portion thereof used by one (1) family and containing one (1) kitchen, which is designed primarily for residential occupancy. Although all group quarters explicitly provide communal kitchen, dining and living facilities shared by the occupants of the building, in some instances individual units within group quarters may include kitchens for the convenience of occupants. This is increasingly common in buildings specifically intended for congregate care and senior assisted living whereby the occupants are provided the option to live and eat within their individual units equipped with a small kitchen. However, despite the inclusion of kitchen facilities in these cases, the principal purpose of the facility remains the provision of living assistance or supervision that inherently includes shared living quarters for unrelated persons and/or the sharing of communal facilities that necessitates occupants living and eating together with other persons in the facility. Accordingly, all group quarters (including those with kitchens in individual units) would not meet the U.S. Census Bureau definition of a residential housing unit and therefore, group quarters will be considered non-residential use types for the purpose of determining the TUMF obligation.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), group quarters are considered to be service use types with the primary use of the facility generally meeting the description of either Hotels, Rooming Houses, Camps and Other Lodging Houses (SIC Major Category 70), Health Services (SIC Major Category 80) or Social Services (SIC Major Category 83). The TUMF obligation for service (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations

Congregate Care, Nursing Homes and Assisted Living

Congregate care facilities (including senior assisted living facilities) and nursing homes are specific types of group quarters whose primary function is to provide care for elderly persons or other persons who are unable to adequately care for themselves due to advanced age or health reasons (such as chronic health care or convalescent care facilities). According to the Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) vehicle ownership by residents of these types of facilities is very low and residents do little or no driving due to their mobility limited condition. Traffic generation at these facilities is primarily limited to employees, visitors, and deliveries. By contrast, trip generation at other types of group quarters such as dormitories, barracks, and group homes is higher due to the increased mobility of residents. For this reason, it is

considered appropriate to review the TUMF calculation methodology specifically for congregate care, nursing home and assisted living facilities.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates a relatively consistent daily trip generation rate for congregate care, nursing home and assisted living facilities based on the number of units or beds, respectively. The daily trip generation rate for congregate care facilities is approximately 2.02 trips per unit (bed), while the daily rate for nursing homes is approximately 2.74 trips per bed and the daily rate for assisted living facilities is 2.66 trips per bed. The relatively small variation in average daily trips between congregate care units, nursing home beds and assisted living beds is indicative of congregate care units (or rooms) typically being intended for occupancy by one individual or related couple. For this reason, the number of units or rooms at a congregate care facility is considered to equate to the number of beds for the purpose of assessing trip generation characteristics in the context of determining TUMF obligation. A nursing home or assisted living facility may include multiple unrelated occupants that share a room or unit therefore making trip generation per bed an appropriate measure.

Table 5.2 summarizes the various characteristics of congregate care facilities and nursing homes, including trip generation. The table also details the calculation of the gross floor area equivalency per bed.

Table 5.2 – Characteristics of Congregate Care Facilities and Nursing Homes							
<i>Land Use Type (ITE Code)</i>	<i>Average Number of Beds</i>	<i>Average Gross Floor Area (sqft)</i>	<i>Average Daily Vehicle Trips per Bed</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Equivalent Beds per 1,000 sqft</i>	<i>Equivalent sqft per Bed</i>	<i>TUMF Weighted Equivalent sqft per Bed**</i>
<i>Congregate Care Facility* (253)</i>	194		2.02				
<i>Nursing Home** (620)</i>	119	63,000	2.74	7.60	2.77	360.5	81.1
<i>Assisted Living (254)</i>	121		2.66				
<i>Median All TUMF Service Use Types</i>				33.79			

Source: Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * - For Congregate Care Facilities, the number of units is considered to be equal to the number of beds.

** - TUMF weighted equivalent a square feet based on equivalent square feet per bed adjusted to reflect relative trip generation between Congregate Care/Nursing Home and all TUMF Service Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

The gross floor area equivalency per bed for Congregate Care Facilities, Nursing Homes and Assisted Living Facilities is based on the trip generation characteristic of Nursing Homes, which is quantified in the Trip Generation Manual in terms of both trips per bed and thousands of square feet of gross floor area. Based on this information, each bed at a Nursing Home represents the equivalent of 360.5 square feet of gross floor area. To

account for the variation in trip generation rates between Congregate Care Facilities and Nursing Homes, and all TUMF service land use types, the gross floor area equivalency per bed was weighted based on the relative trip generation between Nursing Homes and the median of all TUMF Service Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency per bed for Congregate Care Facilities (including Assisted Living Facilities) and Nursing Homes is 81.1.

For the purpose of calculating the TUMF obligation for *all types of congregate care facilities and nursing homes*, the total number of beds will be multiplied by 81.1 to determine the equivalent number of square feet of floor area. The *equivalent floor area will be used for the purpose of calculating the TUMF* at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study. Application of this methodology will account for the considerably lower trip generation rates observed at congregate care facilities and nursing homes, since residents do little or no driving due to their advanced age and/or medical condition.

5.4. Mini-Warehouses and Rental Storage

5.4.1. Summary

For the purpose of determining the TUMF obligation, all types of mini-warehouses or facilities providing rental storage (including outdoor rental storage areas) will be considered industrial use types. The methodology outlined in **Worksheet A.2.4** and described as follows will be applied to determine the gross floor area for all types of mini-warehouses rental storage facilities.

1. Multiply the total site area in acres by 6,647.3 square feet
(i.e. for the example facility it is $3.3 \times 6,647.3 = 21,936$ square feet)
2. Use the resultant value as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

For the purpose of determining the TUMF obligation, a residence that is located entirely within a mini-warehouse or rental storage site and is used exclusively by an on-site caretaker and his/her immediate family is considered to be integral to the primary industrial use of the site and therefore is not subject to any additional TUMF obligation over the amount calculated in accordance with the methodology outlined above.

5.4.2. Detailed Narrative

Mini-warehouses and rental storage facilities include all land uses where the primary business of the site is the rental of units, vaults or spaces to the general public for the storage of goods. While mini-warehouses are typically enclosed buildings, rental storage facilities can include outdoor unenclosed and uncovered areas for the storage of items such as recreational vehicles, boats, trailers and construction equipment. Rental units or spaces are generally delineated and/or physically separated from other units or spaces, and access is typically provided to the site through a common controlled access point. A residential dwelling is sometimes located within a mini-warehouse or rental storage site for use exclusively by an on-site caretaker.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), mini-warehouses and rental storage facilities are considered to be industrial use types with the primary use of the facility generally meeting the description of Motor Freight Transportation and Warehousing (SIC Major Category 42). The TUMF obligation for industrial (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations. However, in the case of mini-warehouses and rental storage facilities, vehicle trips to and from the site is generated primarily by the availability of storage areas and in some cases only very limited building floor area is associated with the storage facility. For this reason, it is necessary to determine the gross floor area equivalency per acre of the site area for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates the daily trip generation rate for mini-warehouses is approximately 35.43 trips per acre of site area, and is approximately 2.50 trips per thousand square feet of building area. **Table 5.3** summarizes the various characteristics of mini-warehouses, including trip generation, and establishes the equivalent square feet per acre for the purpose of calculating the TUMF obligation for all rental storage facilities including those with very limited building floor area associated with the storage facility.

Table 5.3 – Characteristics of Mini-Warehouses							
<i>Land Use Type (ITE Code)</i>	<i>Average Site Area (acres)</i>	<i>Average Gross Floor Area (sqft)</i>	<i>Average Daily Vehicle Trips per Acre</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Equivalent Acres per 1,000 sqft</i>	<i>Equivalent sqft per Acre</i>	<i>TUMF Weighted Equivalent sqft per Acre*</i>
<i>Mini-Warehouse (151)</i>	4	56	35.43	2.50	0.07	14,172	6,647.3
<i>Median of All TUMF Industrial Use Types</i>				5.33			

Source: Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * - TUMF weighted equivalent square feet based on equivalent square feet per acre adjusted to reflect relative trip generation per 1000 sqft between Mini-Warehouse and all TUMF Industrial Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

The gross floor area equivalency per acre of site for Mini-Warehouses and Rental Storage Facilities is based on the trip generation characteristic of Mini-Warehouse, which is quantified in the Trip Generation Manual in terms of both trips per acre and trips per thousand square feet of gross floor area. Based on this information, each acre of Mini-Warehouse represents the equivalent of 14,172 square feet of gross floor area. To account for the variation in trip generation rates between Mini-Warehouses and Rental Storage Facilities, and all TUMF industrial land use types, the gross floor area equivalency per acre was weighted based on the relative trip generation between Mini-Warehouses and the median of all TUMF Industrial Uses as used in the TUMF Nexus

Study. The weighted gross floor area equivalency per acre for Mini-Warehouses and Rental Storage Facilities (including outdoor rental storage areas) is 6,647.3.

For the purpose of calculating the TUMF obligation for *all types of Mini-Warehouses and Rental Storage Facilities*, the total area of the site in acres will be multiplied by 6,647.3 to determine the equivalent number of square feet of floor area. The *equivalent floor area will be used for the purpose of calculating the TUMF* at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.

In some instances, mini-warehouse and rental storage facilities include a residence exclusively for use by an on-site caretaker. For the purpose of determining the TUMF obligation, a residence that is located entirely within a mini-warehouse or rental storage site and is used exclusively by an on-site caretaker and his/her immediate family is considered to be integral to the primary industrial use of the site. Due to the integral nature of a caretaker's residence to the mini-warehouse or rental storage use of the site, a caretaker's residence is not subject to any additional TUMF obligation over the amount calculated in accordance with the methodology outlined in this section.

5.5. Golf Courses

5.5.1. Summary

For the purpose of calculating the TUMF obligation, all public and private golf courses are considered to be service use types. The methodology outlined in **Worksheet A.2.5** and described as follows will be applied to determine the gross floor area for the purpose of calculating the fee obligation for all public and private golf courses (*for the example calculation assume a golf course with 18 holes and including buildings covering an area of 15,000 square feet*).

1. Multiply the total number of holes by 1,057.7 square feet
(i.e. for the example golf course it is $18 \times 1,057.7 = 19,039$ square feet)
2. Determine the total floor area of buildings on the site
(i.e. for the example station it is 15,000 square feet)
3. Compare the results for steps 1 and 2, and use the greater of the two values as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations. (i.e. $19,039 > 15,000$; for the example golf course TUMF would be calculated for 19,039 square feet)

5.5.2. Detailed Narrative

Golf courses are recreational facilities intended specifically for the playing of golf, typically over a 9-, 18-, 27- or 36-hole landscaped course. The use of golf courses can be open to the general public or limited only to members of private country clubs or cooperative owner associations. Some sites may also include additional facilities such as driving ranges, and recreational club houses offering services such as locker rooms, pro shops, lounges, meeting rooms, banquet facilities and management offices.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), golf courses are considered to be service use types with the primary use of the facility generally meeting the description of Amusement and Recreational Services (SIC Major Category 79). The TUMF obligation for service (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations. While the trip making characteristics of golf courses may be readily captured based on the gross floor area of sites including larger club house facilities, in the case of sites with very limited building floor area, vehicle trips to and from the facility will be generated primarily by the actual playing course. For this reason, it is necessary to determine the gross floor area equivalency per hole on the playing course for the purpose of calculating the TUMF obligation where limited building floor area accompanies the golf course.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates the daily trip generation rate for golf courses is approximately 35.74 trips per hole, and is approximately 20.52 trips per employee. **Table 5.4** summarizes the various characteristics of golf courses, including trip generation, and establishes the equivalent square feet per hole for the purpose of calculating the TUMF obligation for golf courses.

Table 5.4 – Characteristics of Golf Courses

<i>Land Use Type (ITE Code)</i>	<i>Average Number of Holes</i>	<i>Average Employees</i>	<i>Average Daily Vehicle Trips per Hole</i>	<i>Average Daily Vehicle Trips per Employee</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Equivalent Holes per 1,000 sqft</i>	<i>Equivalent sqft per Hole</i>	<i>TUMF Weighted Equivalent sqft Hole**</i>
<i>Golf Courses* (430)</i>	20	38	35.74	20.52	53.56	1.50	667.3	1,057.7
<i>Median of All TUMF Service Use Types</i>					33.79			

Source: Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * - Average Daily Trips per 1,000 sqft based on average daily vehicle trips per employee multiplied by the employee conversion factor per 1,000 sqft for all TUMF Service Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

** - TUMF weighted equivalent square feet based on equivalent square feet per hole adjusted to reflect relative trip generation per 1,000 sqft between Golf Course and all TUMF Service Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

The gross floor area equivalency per hole for Golf Courses is based on the trip generation characteristic of Golf Courses, which is quantified in the Trip Generation Manual in terms of trips per hole, trips per acre and trips per employee. For the purpose of calculating TUMF obligation, non-residential fees are determined using gross floor area in square feet. By applying the employee trip conversion factor of 2.61 employees per thousand square feet of service use area (consistent with the TUMF Nexus Study Employment Conversion Factors described in Appendix J), the average daily trips per employee can be defined in terms of the equivalent impact in average daily trips per thousand square feet of service use area. Based on this information, each hole on the playing course is considered to represent the equivalent of 667.3 square feet of gross

floor area. To account for the variation in trip generation rates between Golf Courses, and all TUMF service land use types, the gross floor area equivalency per hole was weighted based on the relative trip generation between Golf Courses and the median of all TUMF Service Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency per hole for Golf Courses is 1,057.7.

For the purpose of calculating the TUMF obligation for *golf courses*, the total number of holes on the playing course will be multiplied by 1,057.7 to determine the equivalent number of square feet of floor area. *The equivalent floor area will be compared to the actual building gross floor area for the site, and the greater of the two floor areas will be used for the purpose of calculating the TUMF at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.*

Application of this methodology will account for variations in the size and scale of club house facilities that affect the nature of the primary business of the site. For example, an average golf course (with 18 holes) that includes 15,000 square feet of gross floor area in club house facilities would have an equivalent floor area of 19,039 square feet ($18 \times 1,057.7$). A comparison of the equivalent floor area and actual building gross floor area indicates that the equivalent floor area is greater than the actual floor area ($19,039 > 15,000$) which is consistent with the primary business of the site being the actual playing course and therefore would be used as the basis for calculating the TUMF obligation. Conversely, an average golf course with 30,000 square feet of gross floor area in club house facilities would have an equivalent floor area of 19,039 square feet ($18 \times 1,057.7$). A comparison of the equivalent floor area and actual building gross floor area indicates that the actual floor area is greater than the equivalent floor area ($30,000 > 19,039$) which is consistent with the increased size and scope of the clubhouse affecting the primary business of the site (the use of the recreational club house service facilities) and therefore would be used as the basis for calculating the TUMF obligation.

5.6. Wholesale Nurseries

5.6.1. Summary

For the purpose of determining the TUMF obligation, all wholesale nurseries will be considered industrial use types. The methodology outlined in **Worksheet A.2.6** and described as follows will be applied to determine the gross floor area for all wholesale nurseries (*for the example calculation assume a wholesale nursery with a total site area of 24.2 acres and including buildings with a gross floor area of 2,750 square feet*).

1. Multiply the total site area in acres by 488.9 square feet
(*i.e. for the example facility it is $24.2 \times 488.9 = 11,831$ square feet*)
2. Determine the total floor area of buildings on the site
(*i.e. for the example facility it is 2,750 square feet*)
3. Compare the results for steps 1 and 2, and use the greater of the two values as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations. (*i.e. $11,831 > 2,750$; for the example wholesale nursery TUMF would be calculated for 11,831 square feet*)

5.6.2. Detailed Narrative

Wholesale Nursery facilities include all land uses where the primary business of the site is the sale of landscape supplies, plants and other farm products to contractors and suppliers. According to the U.S. Census Bureau, the definition for a wholesale nursery is “establishments primarily engaged in the wholesale distribution of flowers, nursery stock, and florists' supplies”. Wholesale nurseries typically incorporate a combination of free-standing buildings and expansive open areas of planting and landscape stock. Most facilities include limited office, storage and shipping facilities.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), wholesale nursery facilities are considered to be industrial use types with the primary use of the facility generally meeting the description of Wholesale Trade – Non-durable Goods (SIC Major Category 51). SIC category code 5193 specifically captures this land use type as “Flowers, Nursery Stock, and Florists' Supplies (merchant wholesalers except those selling nursery stock via retail method)”. The TUMF obligation for industrial (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations. However, in the case of wholesale nursery facilities, vehicle trips to and from the site are generated primarily by the availability of open land used for production, storage and display of plants and other landscape materials. For this reason, it is necessary to determine the gross floor area equivalency per acre of the site area for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates the daily trip generation rate for wholesale nurseries is approximately 2.61 trips per acre of site area, and is approximately 25.14 trips per thousand square feet of building area. **Table 5.5** summarizes the various characteristics of wholesale nurseries, including trip generation, and establishes the equivalent square feet per acre for the purpose of calculating the TUMF obligation for all wholesale nursery facilities, which is typically associated with having very limited building floor area.

Table 5.5 – Characteristics of Wholesale Nurseries

<i>Land Use Type (ITE Code)</i>	<i>Average Site Area (acres)</i>	<i>Average Gross Floor Area (sqft)</i>	<i>Average Daily Vehicle Trips per Acre*</i>	<i>Average Daily Vehicle Trips per 1,000 sqft **</i>	<i>Equivalent Acres per 1,000 sqft</i>	<i>Equivalent sqft per Acre</i>	<i>TUMF Weighted Equivalent sqft per Acre***</i>
<i>Wholesale Nursery (818)</i>	24.2	2,750	2.61	25.14	9.65	104	488.9
<i>Median of All TUMF Industrial Use Types</i>				5.33			

Source: [Trip Generation 9th Edition](#), Institute of Traffic Engineers, 2012

Note: * - Average Daily Trips per acre based on interpolation of Average Weekend Peak Hour and Daily Trips per acre to the Weekday Peak Hour Trips per acre

** - Average Daily Trips per 1,000 sqft based on interpolation of Average Weekend Peak Hour and Daily Trips per 1,000 sqft to the Weekday Peak Hour Trips per 1000 sqft

*** - TUMF weighted equivalent square feet based on equivalent square feet per acre adjusted to reflect relative trip generation per 1000 sqft between Wholesale Nursery and all TUMF Industrial Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

The gross floor area equivalency per acre of site for Wholesale Nursery is based on the trip generation characteristic of Wholesale Nursery, which is quantified in the Trip Generation Manual in terms of both trips per acre and trips per thousand square feet of gross floor area. Based on this information, each acre of Wholesale Nursery represents the equivalent of 104 square feet of gross floor area. To account for the variation in trip generation rates between Wholesale Nursery, and all TUMF industrial land use types, the gross floor area equivalency per acre was weighted based on the relative trip generation between Wholesale Nursery and the median of all TUMF Industrial Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency per acre for Wholesale Nursery is 488.9.

For the purpose of calculating the TUMF obligation for *all types of Wholesale Nurseries*, the total area of the site in acres will be multiplied by 488.9 to determine the equivalent number of square feet of floor area. The *equivalent floor area will be compared to the actual building gross floor area* for the site, and the *greater of the two floor areas will be used for the purpose of calculating the TUMF* at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.

Application of this methodology will account for variations in the size and scale of buildings that affect the nature of the primary business of the site. For example, an average wholesale nursery (covering 24.2 acres) that includes 2,750 square feet of gross floor area in buildings would have an equivalent floor area of 11,831 square feet (24.2 x 488.9). A comparison of the equivalent floor area and actual building gross floor area indicates that the equivalent floor area is greater than the actual floor area (11,831 > 2,750) which is consistent with the primary business of the site being the outdoor production, storage and display areas, and therefore would be used as the basis for calculating the TUMF obligation. Conversely, an average wholesale nursery with 20,000 square feet of gross floor area in buildings would have an equivalent floor area of

11,831 square feet (24.2 x 488.9). A comparison of the equivalent floor area and actual building gross floor area indicates that the actual floor area is greater than the equivalent floor area (20,000 > 11,831) which is consistent with the increased size and scope of the buildings affecting the primary business of the site and therefore would be used as the basis for calculating the TUMF obligation.

5.7. Retail Nurseries (Garden Centers)

5.7.1. Summary

For the purpose of determining the TUMF obligation, all retail nurseries (also referred to as “Garden Centers”) will be considered retail use types. The methodology outlined in **Worksheet A.2.7** and described as follows will be applied to determine the gross floor area for all retail nurseries (*for the example calculation assume a retail nursery with a total site area of 2.5 acres and including buildings with a gross floor area of 9,650 square feet*).

1. Multiply the total site area in acres by 2,118.8 square feet
(i.e. for the example facility it is $2.5 \times 2,118.8 = 5,297$ square feet)
2. Determine the total floor area of buildings on the site
(i.e. for the example facility it is 9,650 square feet)
3. Compare the results for steps 1 and 2, and use the greater of the two values as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations. (i.e. $9,650 > 5,297$; for the example retail nursery TUMF would be calculated for 9,650 square feet)

This methodology applies only to retail nurseries and garden centers that are free-standing businesses. Where the selling of garden and landscaping supplies (including plants) is an integral component of a more extensive retail store, the TUMF obligation will be determined based exclusively on the gross building area of the primary business of the site.

5.7.2. Detailed Narrative

Retail Nursery facilities (also referred to as ‘Garden Centers’) include all land uses where the primary business of the site is the retail sale of garden and landscaping supplies, including plants. According to the U.S. Census Bureau, the definition for a retail nursery is an “establishment primarily engaged in selling trees, shrubs, other plants, seeds, bulbs, mulches, soil conditioners, fertilizers, pesticides, garden tools, and other garden supplies to the general public. These establishments primarily sell products purchased from others, but may sell some plants which they grow themselves”. Like their wholesale counterparts they typically incorporate a combination of free-standing buildings with an open area of planting and landscape stock.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), retail nursery facilities are considered to be retail use types with the primary use of the facility generally meeting the description of Retail Trade –

Building Materials, Hardware, Garden Supply and Mobile Home Dealers (SIC Major Category 52). The TUMF obligation for retail (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations. However, in the case of retail nursery facilities, vehicle trips to and from the site may be generated primarily by the availability of open land used for storage and display of plants and other landscape materials. For this reason, it is necessary to determine the gross floor area equivalency per acre of the site area for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates the daily trip generation rate for retail nurseries is approximately 108.1 trips per acre of site area, and is approximately 68.1 trips per thousand square feet of building area. **Table 5.6** summarizes the various characteristics of retail nurseries, including trip generation, and establishes the equivalent square feet per acre for the purpose of calculating the TUMF obligation for all retail nursery facilities, which is typically associated with having very limited building floor area.

The gross floor area equivalency per acre of site for Retail Nursery is based on the trip generation characteristic of Retail Nursery, which is quantified in the Trip Generation Manual in terms of both trips per acre and trips per thousand square feet of gross floor area. Based on this information, each acre of Retail Nursery represents the equivalent of 1,587 square feet of gross floor area. To account for the variation in trip generation rates between Retail Nursery, and all TUMF retail land use types, the gross floor area equivalency per acre was weighted based on the relative trip generation between Retail Nursery and the median of all TUMF Retail Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency per acre for Retail Nursery is 2,118.8.

Table 5.6 – Characteristics of Retail Nurseries							
<i>Land Use Type (ITE Code)</i>	<i>Average Site Area (acres)</i>	<i>Average Gross Floor Area (sqft)</i>	<i>Average Daily Vehicle Trips per Acre</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Equivalent Acres per 1,000 sqft</i>	<i>Equivalent sqft per Acre</i>	<i>TUMF Weighted Equivalent sqft per Acre*</i>
<i>Retail Nursery (817)</i>	3.0	5	108.10	68.10	0.63	1,587	2,118.8
<i>Median of All TUMF Retail Use Types</i>				51.02			

Source: Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * - TUMF weighted equivalent square feet based on equivalent square feet per acre adjusted to reflect relative trip generation per 1000 sqft between Retail Nursery and all TUMF Retail Uses.

For the purpose of calculating the TUMF obligation for *all types of Retail Nursery*, the total area of the site in acres will be multiplied by 2,118.8 to determine the equivalent number of square feet of floor area. The *equivalent floor area will be compared to the actual building gross floor area* for the site, and the *greater of the two floor areas will be*

used for the purpose of calculating the TUMF at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study.

Application of this methodology will account for variations in the relative size and scale of buildings and open areas that affect the nature of the primary business of the site. For example, an average retail nursery (covering 2.5 acres) that includes 9,650 square feet of gross floor area in buildings would have an equivalent floor area of 5,297 square feet ($2.5 \times 2,118.8$). A comparison of the equivalent floor area and actual building gross floor area indicates that the actual floor area is greater than the equivalent floor area ($9,650 > 5,297$) which is consistent with the primary business of the site being generated by the retail buildings, and therefore would be used as the basis for calculating the TUMF obligation. Conversely, an average retail nursery with 9,650 square feet of gross floor area in buildings and covering 10 acres would have an equivalent floor area of 21,188 square feet ($10 \times 2,118.8$). A comparison of the equivalent floor area and actual building gross floor area indicates that the equivalent floor area is greater than the actual floor area ($21,188 > 9,650$) which is consistent with the increased size and scope of the outdoor production, storage and display area affecting the primary business of the site and therefore would be used as the basis for calculating the TUMF obligation.

It is to be noted that application of this methodology applies only to retail nurseries and garden centers that are free-standing businesses and not integral components of a more extensive retail store, such as a discount store, discount club, hardware store, home improvement superstore or supermarket. Where the selling of garden and landscaping supplies (including plants) is an integral component of a more extensive retail store, the TUMF obligation will be determined based exclusively on the gross building area of the primary business of the site.

5.8. High-Cube Warehouses and Distribution Centers

5.8.1. Summary

For the purpose of determining the TUMF obligation, all types of high-cube warehouses or distribution centers will be considered industrial use types. The methodology outlined in **Worksheet A.2.8** and described as follows will be applied to determine the equivalent floor area for high-cube warehouses/distribution centers with a minimum gross floor area of 200,000 square feet, a minimum ceiling height of 24 feet and a minimum dock-high door loading ratio of 1 door per 10,000 square feet (*for the example calculation assume a high-cube warehouse with a gross floor area of 450,000 square feet, a ceiling height exceeding 24 feet and a dock-high door loading ratio exceeding 1:10,000*):

1. Subtract 200,000 square feet from the total gross floor area
(i.e. for the example facility it is $450,000 - 200,000 = 250,000$ square feet)
2. Multiply the resultant value from step 1 which is total gross floor area in excess of 200,000 square feet by 0.32
(i.e. for the example facility it is $250,000 \times 0.32 = 80,000$ square feet)
3. Add 200,000 square feet to the resultant value of step 2
(i.e. for the example facility it is $200,000 + 80,000 = 280,000$ square feet)

4. Use the resultant value of step 3 as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

The TUMF obligation for a warehouse facility with a gross floor area of less than 200,000 square feet, a ceiling height of less than 24 feet and/or a dock-high door loading ratio of less than 1 door per 10,000 square feet will be calculated based on the actual gross floor area using **Worksheet A.2.1** for standard non-residential fee calculations. Furthermore, where other uses such as wholesale showrooms, retail showrooms or office suites are co-located with qualifying high-cube warehouse facilities, only the qualifying warehouse portion of the premises will be calculated using **Worksheet A.2.8**. The fee obligation for all other co-located facilities will be calculated based on the actual gross floor area and the appropriate land use category using **Worksheet A.2.1** for standard non-residential fee calculations.

5.8.2. Detailed Narrative

High-cube warehouses or distribution centers are primarily for the storage and/or consolidation of manufactured goods (and to a lesser extent, raw materials) prior to their distribution to retail locations or other warehouses. These facilities are generally very large buildings characterized by a small employment count due to a high level of automation, and truck activities frequently outside of the peak hour of the adjacent street system. For the purpose of determining the TUMF obligation, high-cube warehouses and distribution centers are defined as follows:

Very large shell buildings commonly constructed using steel framed and/or concrete tilt-up techniques with a minimum gross floor area of 200,000 square feet, a minimum ceiling height of 24 feet and a minimum dock-high door loading ratio of 1 door per 10,000 square feet.

In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), high-cube warehouses and distribution center facilities are considered to be industrial use types with the primary use of the facility generally meeting the description of Motor Freight Transportation and Warehousing (SIC Major Category 42). The TUMF obligation for industrial (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use and is calculated using **Worksheet A.2.1** for standard non-residential fee calculations. However, in the case of high-cube warehouses and distribution centers, vehicle trips generated to and from the site are typically lower than traditional industrial uses due to the small employee count and highly automated activities. For this reason, it is necessary to determine the gross floor area equivalency for the purpose of calculating the TUMF obligation.

A review of Trip Generation 9th Edition (Institute of Traffic Engineers, 2012) indicates the average weekday daily trip generation rate for high-cube warehouses is 1.68 trips per thousand square feet, while the weekday PM peak-hour trip generation rate for the same uses is approximately 0.16 trips per thousand square feet of building area. By comparison, traditional warehouse uses have a weekday daily trip generation rate of

3.56 trips per thousand square feet, and PM peak-hour trip generation rates of 0.45 trips per thousand square feet and 0.58 trips per employee. A study completed in January 2005 by Crain and Associates for the National Association of Industrial and Office Properties (NAIOP) indicates a weekday daily trip generation rate of 1.10 trips per thousand square feet and a weekday PM peak rate of 0.08 trips per thousand square feet for high-cube warehouse sites in the Inland Empire.

Table 5.7 summarizes the various characteristics of high-cube warehouses, including trip generation, and establishes the equivalent square feet for the purpose of calculating the TUMF obligation for all high-cube warehouse and distribution centers.

Table 5.7 – Characteristics of High-Cube Warehouses and Distribution Centers				
<i>Land Use Type (ITE Code)</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Average PM Peak Vehicle Trips per 1,000 sqft</i>	<i>Average PM Peak Trips per Employee</i>	<i>TUMF Weighted Equivalent sqft *</i>
<i>High-Cube Warehouse (i) (152)</i>	1.68	0.16		0.32
<i>Warehousing (i) (150)</i>	3.56	0.45	0.58	
<i>Warehouse/Distribution Center (ii)</i>	1.10	0.08		
<i>All TUMF Industrial Use Types (i)</i>	5.33			

Source: (i) Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

(ii) San Bernardino/Riverside County Warehouse/Distribution Center Vehicle Trip Generation Study, Crain and Associates, January 2005

Note: * - TUMF weighted equivalent square feet based on relative trip generation per 1000 sqft between High-Cube Warehouse (calculated) and all TUMF Industrial Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

The gross floor area equivalency for High-Cube Warehouses and Distribution Centers is based on the trip generation characteristic of High-Cube Warehouse, which is quantified in the Trip Generation Manual in terms of both daily and PM peak trips per thousand square feet gross floor area. Based on this information, the daily trip generation rate for a high-cube warehouse is approximately 1.68 trips per thousand square feet of gross floor area. To account for the variation in trip generation rates between High-Cube Warehouses and Distribution Centers, and all TUMF industrial land use types, the gross floor area equivalency was weighted based on the relative trip generation between High-Cube Warehouses and the median of all TUMF Industrial Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency for High-Cube Warehouses and Distribution Centers is 0.32.

For the purpose of calculating the TUMF obligation for *High-Cube Warehouses and Distribution Centers* with a minimum gross floor area of 200,000 square feet, a minimum ceiling height of 24 feet and a minimum dock-high door loading ratio of 1 door per 10,000 square feet, the gross floor area *in excess of 200,000 square feet* will be multiplied

by 0.32 and the resultant value *increased by 200,000 square feet* to determine the equivalent number of square feet of floor area. The *equivalent floor area will be used for the purpose of calculating the TUMF* at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study. For example, a high-cube warehouse with a gross floor area of 450,000 square feet, a ceiling height exceeding 24 feet and a dock-high door loading ratio exceeding 1:10,000 (for the example facility it is at least 45 dock-high door loading bays i.e. $450,000/10,000 = 45$) the equivalent floor area would be 280,000 square feet ($\{[450,000 - 200,000] \times 0.32\} + 200,000 = 280,000$)

The TUMF obligation for a warehouse facility with a gross floor area of less than 200,000 square feet, a ceiling height of less than 24 feet and/or a dock-high door loading ratio of less than 1 door per 10,000 square feet will be calculated based on the actual gross floor area using **Worksheet A.2.1** for standard non-residential fee calculations. Furthermore, where other uses such as wholesale showrooms, retail showrooms or office suites are co-located with qualifying high-cube warehouse facilities, only the qualifying warehouse portion of the premises will be calculated using **Worksheet A.2.8**. The fee obligation for all other co-located facilities will be calculated based on the actual gross floor area and the appropriate land use category using **Worksheet A.2.1** for standard non-residential fee calculations.

5.9. Winery

5.9.1. Summary

For the purposes of determining the TUMF obligation, small, medium and large wineries, as defined below, are categorized using **Worksheet A.2.9** and fees calculated differently for each category using the methodology described.

Small Winery – A winery characterized by predominantly agricultural and industrial uses involving the cultivation of grapes and/or production of wine. Ancillary uses associated with a small winery can include a small tasting room not exceeding 700 square feet, and associated uses such as office and administration space, minor retail and/or small deli-type (packaged food) service that does not require a kitchen. The total building area for all buildings associated with a small winery cannot exceed 15,000 square feet.

Small winery is considered an industrial use type. TUMF obligation for small winery will be calculated based on the gross floor area of all buildings associated with the winery including all wine production and storage areas, and ancillary associated tasting room, office and administration space, minor retail and/or deli-type (packaged food) service that does not require a kitchen, using **Worksheet A.2.1** for standard non-residential fee calculations.

Medium Winery – A winery with integrated supporting operations, such as tasting room with floor area greater than 700 square feet including outdoor tasting areas, retail, event space, and/or small sit-down restaurant with primary operating hours at lunch. The patrons of the retail shops and restaurant facilities are primarily visitors to

the wine-tasting room, therefore the additional facilities are not viewed as generating additional traffic to the primary use, which is wine tasting and purchase. The total building area for all buildings associated with a medium winery cannot exceed 15,000 square feet.

Medium winery is considered an industrial use type. The methodology outlined in **Worksheet A.2.10** and described as follows will be applied to determine the gross floor area for medium wineries.

1. Multiply the total gross floor area of all buildings associated with the winery including all wine production and storage areas, and ancillary associated tasting room, office and administration space, retail, event space, and/or restaurant by 1.38.

(i.e. For an example facility with 11,350 square feet gross floor area it is $1.38 \times 11,350 = 15,663$ square feet)

2. Use the resultant value as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

Large Winery – Winery with total building area exceeding 15,000 square feet and typically including several other significant trip generating operations occurring on-site in addition to the winery operations, such as a retail shop, sit-down restaurant, hotel, and concert/event venue that operate separately from the winery.

Due to the unique variations of uses associated with each specific large winery, the TUMF obligation is calculated independently for each definable major on-site trip generating use associated with the winery (such as hotel, restaurant, office) using **Worksheet A.2.1** for standard non-residential fee calculations. For the portion of a large winery that is used primarily for wine production and storage, wine tasting and the sale of associated merchandise, the TUMF obligation can be calculated using the methodology outlined in **Worksheet A.2.11** and described as follows will be applied to determine the gross floor area for large wineries.

1. Multiply the total gross floor area of all buildings associated with winery uses only (wine production and storage, wine tasting and the sale of associated merchandise) by 1.38.

(i.e. For an example facility with 16,000 square feet of winery uses it is $1.38 \times 16,000 = 22,080$ square feet)

2. Use the resultant value as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

5.9.2. Detailed Narrative

For the purposes of determining the TUMF obligation, wineries are categorized into small, medium and large wineries, as defined below.

Small Winery – Characterized by predominantly agricultural and industrial uses involving the cultivation of grapes and/or production of wine. Ancillary uses associated with a small winery can include a small tasting room not exceeding 700 square feet, and associated uses such as office and administration space, minor retail and/or small deli-type (packaged food) service not requiring a kitchen. The total building area for all buildings associated with a small winery cannot exceed 15,000 square feet.

Medium Winery – Winery with integrated supporting operations, such as tasting room with floor area greater than 700 square feet including outdoor tasting areas, retail, event space, and/or small sit-down restaurant with primary operating hours at lunch. The patrons of the retail shops and restaurant facilities are primarily visitors to the wine-tasting room, therefore the additional facilities are not viewed as generating additional traffic to the primary use, which is wine tasting and purchase. The total building area for all buildings associated with a medium winery cannot exceed 15,000 square feet.

Large Winery – Winery with total building area exceeding 15,000 square feet and typically including several other significant trip generating operations occurring on-site in addition to the winery operations, such as a retail, sit-down restaurant, hotel, and concert/event venue operating separately from the winery.

The Traffic Impact Analysis (TIA) conducted for the Europa Village development (Urban Crossroads, June 2008) included traffic counts at a select number of wineries in the Temecula Valley region and developed a customized trip generation rate specifically for wine-tasting facilities in this area. The facilities included in this TIA were small, medium and large wineries with various amenities. The primary trip generating variable was the size of the wine tasting room, with additional trips at the large wineries generated by other amenities such as resort, spa and overnight hotel accommodations. The number of employees was deemed insignificant to the trip generation based on this study.

Small wineries, as defined above, predominately focus on agriculture (grape cultivation) and industrial (wine production) uses but may include a small ancillary tasting room and/or office facility, are estimated to generate traffic consistent with other light industrial and agricultural facilities. The TUMF obligation for small wineries will to be calculated using the standard non-residential methodology and the adopted industrial fee rate.

Medium sized wineries, as defined previously, are unique trip generators encompassing more than industrial/agricultural activities, such that the use of the site is predominately wine tasting and the sale of wine and associated merchandise. Based on the Europa Village Trip Generation Report, **Table 5.8** details the determination of the weighted equivalent floor space for calculating the TUMF obligation of medium wineries.

Table 5.8 – Medium Winery TUMF Calculation				
<i>Land Use Type</i>	<i>Average Gross Floor Area (sqft)</i>	<i>Average Daily Vehicle Trips per 1,000 sqft*</i>	<i>Equivalent Daily Vehicle Trips per 1,000 sqft</i>	<i>TUMF Weighted Equivalent sqft *</i>
<i>Wine Tasting Room (i)</i>	1,000	83.46		
<i>Winery (all associated buildings) (i)</i>	11,350		7.35	1.38
<i>Median of All TUMF Industrial Use Types (ii)</i>		5.33		

Source: Europa Village TIA, Urban Crossroads, prepared June 2, 2008 and revised March 17, 2009 for County of Riverside

(ii) Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * TUMF weighted equivalent square feet based on the daily vehicle trips per 1,000 sqft adjusted to reflect relative trip generation per 1000 sqft between medium wineries and all TUMF Industrial Uses (consistent with TUMF Nexus Study Trip Generation Rate Comparison).

Large sized wineries, as defined previously, include various types of trip generators (such as wine tasting and associated retail, restaurant and banquet facilities, hotel accommodations and resort spa) that differ based on the uses associated with a particular large winery development. Due to the unique variations of uses associated with each specific large winery, the TUMF obligation is calculated independently for each definable major on-site trip generating use associated with the winery (such as hotel, restaurant, office). For the portion of a large winery that is used primarily for wine tasting and the sale of associated merchandise, the TUMF obligation will be calculated using the methodology described previously for medium wineries.

The gross floor area equivalency for a Medium Winery is based on the trip generation characteristic of a Medium Winery, which is quantified in the Europa Village Trip Generation Report in terms of 24-hour trips per thousand square feet of wine tasting room. Based on this information, the calculated daily trip generation rate for a winery is approximately 83.46 trips per thousand square feet of wine tasting room. To simplify the application of TUMF for a Medium Winery, the daily trip generation rate based on the wine tasting room was converted to a daily trip generation rate for the total gross floor area of all buildings associated with the winery or 7.35 trips per thousand square feet of winery total gross floor area. To account for the variation in trip generation rates between a Medium Winery and all TUMF industrial land use types, the gross floor area equivalency was weighted based on the relative trip generation between a Medium Winery and the median of all TUMF Industrial Uses as used in the TUMF Nexus Study. The weighted gross floor area equivalency for a Medium Winery is 1.38.

For the purpose of calculating the TUMF obligation for a *Winery*, the following methodology is used, respectively, for the three defined winery category types:

Small Winery, with a tasting room and/or other associated ancillary uses with a floor area of **less than** 700 square feet and a total gross floor area of all buildings **less than** 15,000 square feet, is considered to be an industrial use type. TUMF obligation for *small winery* will be calculated based on the gross floor area of all buildings associated with the winery including all wine production and storage areas, and ancillary associated tasting room, office and administration space, minor retail and/or deli-type (packaged food) service not requiring a kitchen, using the standard non-residential fee calculation methodology.

Medium Winery, with a tasting room and/or other associated ancillary uses with a floor area of **greater than** 700 square feet including outdoor tasting areas and a total gross floor area of all buildings **less than** 15,000 square feet, is considered to be an industrial use type. For the purpose of calculating the TUMF obligation for *medium winery*, the total gross floor area of all buildings associated with the winery including all wine production and storage areas, and ancillary associated tasting room, office and administration space, retail, event space, and/or restaurant will be multiplied by 1.38 to determine the equivalent number of square feet of floor area. The equivalent floor area will be used for the purpose of calculating the TUMF at the rate prescribed by the respective local jurisdictions TUMF Ordinance and supported by the TUMF Nexus Study. Application of this methodology will account for the higher trip generation rates observed at medium wineries, since medium wineries have associated retail and service uses that generate more trips than those associated with wine production.

Large Winery, with a total gross floor area of all buildings **greater than** 15,000 square feet, is considered to be a mixed use type due to the various types of trip generators associated with the winery development. Due to the unique variations of uses associated with each specific large winery, the TUMF obligation is calculated independently for each definable major on-site trip generating use associated with the winery (such as hotel, restaurant, office). For the portion of a large winery that is used primarily for wine production and storage, wine tasting and the sale of associated merchandise, the TUMF obligation will be calculated using the methodology described previously for *medium wineries*.

5.10. Electric Vehicle Supply Equipment Charging Stations

5.10.1. Summary

For the purpose of calculating the TUMF obligation, stand-alone businesses with the primary purpose of providing publically accessible electric vehicle supply equipment (EVSE) are designated as EVSE charging stations and will be considered retail use types. The methodology outlined in **Worksheet A.2.12** and described as follows will be applied to determine the gross floor area for calculating the TUMF obligation for all types of EVSE charging stations.

1. Multiply the total number of EVSE charging units by 14.9. The total number of EVSE charging units is equal to the maximum number of vehicles that could be connected for charging at the same time.

(i.e. for an example facility with 4 positions it is $14.9 \times 4 = 59.6$ square feet)

2. Use the resultant value as the gross floor area to calculate the TUMF obligation using **Worksheet A.2.1** for standard non-residential fee calculations.

EVSE located within a residential or non-residential use type, where the residential or non-residential use is the primary use of the site, and the EVSE is for the sole and exclusive use of residents, employees and/or customers of the same premises, are considered to be ancillary to the primary residential or non-residential use of the site. There is no additional TUMF obligation for EVSE located within a residential or non-residential use type for the sole and exclusive use of residents, employees and/or customers of the same premises.

5.10.2. Detailed Narrative

Electric vehicle supply equipment (EVSE) charging stations include all stand-alone publically accessible retail land uses where the primary business of the site is providing electrical supply equipment for connecting and charging batteries that power electric or plug-in electric/gasoline hybrid motor vehicles. In accordance with Section 6.2 and Appendix B of the Transportation Uniform Mitigation Fee Nexus Study 2016 Update Final Report (Western Riverside Council of Governments, As Adopted July 10, 2017), fuel filling stations and other fuel dealers are considered to be retail uses for the purpose of calculating the applicable TUMF obligation for newly developed facilities or expansions of existing facilities. Although EVSE charging stations are a relatively new land use that is not specifically mentioned in the North American Industrial Classification System (NAICS) codes due to the recent introduction of electric or plug-in electric/gasoline hybrid motor vehicles for sale to the general public, EVSE charging stations serve a similar purpose to fuel filling stations and for this reason are similarly treated as a retail use for the purposes of determining the TUMF obligation.

EVSE charging units may also be located within residential and non-residential land uses, where EVSE is provided as an amenity for those utilizing the primary land use of the site (for example, EVSE charging units located in the parking lot of a retail shopping mall, service office building, or residential apartment complex). Where EVSE is located within a residential or non-residential use type for the sole and exclusive use of residents, employees and/or customers of the same premises (i.e. not stand-alone businesses and/or publically accessible) are considered to be ancillary to the primary residential or non-residential use of the site and unlikely to generate additional vehicle trips specifically for the purposes of accessing the charging station. There is no additional TUMF obligation for EVSE located within a residential or non-residential use type for the sole and exclusive use of residents, employees and/or customers of the same premises.

The TUMF for retail (and all non-residential) land uses is based on the gross floor area of buildings associated with the specific land use. However, in many cases the EVSE is a pedestal or wall mount unit with very limited to no building gross floor area. Vehicle trips to and from the site can be generated by the EVSE charging positions making it

necessary to determine the gross floor area equivalency per EVSE charging position for the purpose of calculating the TUMF obligation.

The EV Project website (TheEVProject.com) provides the most comprehensive source of data available on electric vehicle charging infrastructure. The EV Project is managed by ECOTality, Inc. primarily utilizing grant funding provided by the U.S. Department of Energy and various other partner matches. Launched in October 2009, The EV Project is the largest deployment of electric vehicles and charging infrastructure with chargers being installed in major cities in no fewer than nine states, including California, and the District of Columbia. The EV Project will deploy approximately 13,000 alternating current (AC) Level 2 EVSE charging stations for residential and commercial use, as well as 200 dual-port direct current (DC) Fast Chargers (DCFC). The EV Project also collects and analyzes data on the characteristics of electric vehicle use, including trip generation and charging station utilization rates.

According to the EV Project EVSE and Vehicle Usage Report for the 2nd Quarter of 2013 (the most recent available report as of January 22, 2014), a total of 295 publically accessible charging stations have been deployed by the project in the Los Angeles metropolitan area providing for a total of 6,688 vehicle charges for the period from April 1, 2013 to June 30, 2013. The average length of time a vehicle is connected to the EVSE is 4.0 hours, while the average length of time a vehicle is drawing power is 2.3 hours. Based on the data for the 2nd Quarter of 2013, the EV Project has determined the average number of charging events started per EVSE per weekday to be 0.38, representing an average of 0.76 daily vehicle trips per EVSE per weekday. **Table 5.9** summarizes key performance measures for publically accessible Level 2 EVSE in the Los Angeles Metropolitan Area.

Table 5.9 - Publically Accessible Level 2 EVSE in the Los Angeles Metropolitan Area

<i>Quarter</i>	<i>Total EVSE Units</i>	<i>Total Weekday Charges Per Quarter</i>	<i>Average Daily Charges per EVSE Unit (weekday)</i>	<i>Average Daily Vehicle Trips per EVSE Unit (weekday)*</i>
<i>Q1 2012</i>	43	508	0.27	0.54
<i>Q2 2012</i>	98	1,275	0.31	0.62
<i>Q3 2012</i>	201	3,142	0.28	0.56
<i>Q4 2012</i>	212	3,294	0.26	0.52
<i>Q1 2013</i>	221	4,370	0.32	0.64
<i>Q2 2013</i>	295	6,688	0.38	0.76

Source: *The EV Project Quarterly Reports* accessed online January 22, 2014

<http://www.theevproject.com/documents.php>

Note: * - Average Daily Vehicle Trips per EVSE is a calculated value assuming one vehicle trip to the site before the charge event and a second vehicle trip away from the site after the charge event.

A comparison of 2nd Quarter 2013 data with data for prior quarters demonstrates that the average daily charges per units has been steadily increasing over time as more EVSE units are deployed and more electric and plug-in electric/gasoline hybrid vehicles

enter the vehicle fleet. For this reason, the average daily vehicle trips per EVSE unit should be reviewed on a regular basis and updated accordingly to ensure that the most representative trip generation rate is being utilized for determining the TUMF obligation.

Table 5.10 summarizes the various characteristics of EVSE units, including trip generation. The table also details the calculation of the gross floor area equivalency per EVSE unit.

The gross floor area equivalency per EVSE Unit for Electric Vehicle Supply Equipment Charging Stations is based on the trip generation characteristic of EVSE units quantified in the EV Project Quarterly Reports in terms of Average Daily Charges per ESVE Unit and a resultant calculated value for Average Daily Vehicle Trips per EVSE Unit. Based on this information, each EVSE unit generates an average of 0.76 vehicle trips per weekday. To establish a gross floor area equivalency per ESVE unit, the trip generation rates between EVSE Charging Stations and all TUMF retail land use types were compared, and a gross floor area equivalency per EVSE unit was interpolated. The weighted gross floor area equivalency per EVSE unit for Electric Vehicle Supply Equipment Charging Stations is 14.9.

Table 5.10 – Characteristics of Electric Vehicle Supply Equipment Charging Stations				
<i>Land Use Type</i>	<i>Average Daily Vehicle Trips per EVSE Unit</i>	<i>Average Daily Vehicle Trips per 1,000 sqft</i>	<i>Equivalent EVSE Units per 1,000 sqft</i>	<i>TUMF Weighted Equivalent sqft per EVSE Unit*</i>
<i>Electric Vehicle Supply Equipment Charging Unit (i)</i>	0.76		67.13	14.9
<i>Median of All TUMF Retail Use Types (ii)</i>		51.02		

Sources: (i) The EV Project, Quarter 2, 2013 Quarterly Report, ECOTality North America, 2013
(ii) Trip Generation 9th Edition, Institute of Traffic Engineers, 2012

Note: * - TUMF weighted equivalent per square feet based on equivalent square feet per EVSE unit.

For the purpose of calculating the TUMF obligation, stand-alone businesses with the primary purpose of providing publically accessible electric vehicle supply equipment (EVSE) are designated as *Electric Vehicle Supply Equipment Charging Stations*. For EVSE Charging Stations, the total number of EVSE units will be multiplied by 14.9 to determine the equivalent number of square feet of floor area, with the total number of EVSE units being equal to the maximum number of vehicles that could be connected for charging at the same time.

Appendix A

Fee Calculation Worksheets

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APPENDIX A: FEE CALCULATION WORKSHEETS

This section contains individual fee calculation worksheets for standard use fee calculations, and defined uses following the specific defined use fee calculation methodology developed in **Section 4.0** and **Section 5.0**. **Section A.1** outlines worksheets for residential use types and **Section A.2** outlines worksheets for non-residential use types.

A.1 Fee Calculation Worksheets for Residential Use Types

Worksheet A.1.1 Standard Residential TUMF Calculation Worksheet

1.	 Enter Total Number of Single-Family Dwelling Units	X	 Enter TUMF Single-Family Rate Per Dwelling Unit	=		← Total A
2.	 Enter Total Number of Multi-Family Dwelling Units	X	 Enter TUMF Multi-Family Rate Per Dwelling Unit	=		← Total B
3.	 Enter Total A	+	 Enter Total B	=	\$	TUMF Obligation

1. Residential TOD Characteristics Checklist

- ☐ **Residential use of not less than 50% of total floorspace**
Submit Site Plan with table or narrative explanation
- ☐ **Meets maximum number of parking spaces requirement**
Submit Site Plan indicating number of associated parking spaces
- ☐ **Transit station along a barrier-free walkable pathway not exceeding ½ mile**
Submit Location Map showing transit station and barrier-free walkable path from development
- ☐ **One (1) convenience retail store selling food within ½ mile**
Submit Location Map showing at least one (1) Food Retail establishment within ½ mile of development
- ☐ **Seven (7) diverse uses within ½ mile**
Submit Location Map showing at least seven (7) eligible diverse uses within ½ mile of development including at least one (1) Food Retail described previously

2. Residential TOD Fee Calculation

\$	X	0.885	=	\$
Enter Standard Residential TUMF Obligation for eligible TOD as calculated using Worksheet A.1.1				TUMF Residential TOD Obligation

1. Active Senior Living Characteristics Checklist

- ☐ **Minimum number of 20 dwelling units in community**
Submit Site Plan indicating the total number of associated dwelling units
- ☐ **Local zoning and/or governing documents**
Submit local zoning and/or governing documents characterizing development as senior citizen housing (active senior living) pursuant to Cal. Civ. Code § 51.11
- ☐ **Occupancy restriction statement**
Submit Public Report with statement of occupancy restrictions pursuant to Cal. Bus. & Prof. Code § 11010.05 [2016]

2. Active Senior Living TUMF Calculation

	X 0.53 =	
Enter Total Number of Active Senior Living Dwelling Units (both detached and attached)		Enter this value as (part of) the <u>Total Number of Multi-Family Dwelling Units</u> in Worksheet A.1.1

A.2 Fee Calculation Worksheets for Non-Residential Use Types

Worksheet A.2.1 Standard Non-Residential TUMF Calculation Worksheet

1.		X		=		← Total A
	Enter Total Gross Floor Area of Industrial Buildings (in square feet)		Enter TUMF Industrial Rate Per Square Foot			
2.		X		=		← Total B
	Enter Total Gross Floor Area of Retail Buildings (in square feet)		Enter TUMF Retail Rate Per Square Foot			
3.		X		=		← Total C
	Enter Total Gross Floor Area of Service Buildings (in square feet)		Enter TUMF Service Rate Per Square Foot			
4.		+		+		= \$
	Enter Total A		Enter Total B		Enter Total C	TUMF Obligation

Worksheet A.2.2 Fuel Filling Station TUMF Calculation Worksheet

1.		X	1,403.8	=		← Total A
	Enter Total Number of Fuel Filling Positions					
2.						← Total B
					Enter Total Gross Floor Area of Buildings (in square feet)	
3.						Enter this value as (part of) the <u>Total Gross Floor Area of Retail Buildings</u> in Worksheet A.2.1
	Enter the greater of Total A and Total B					

Worksheet A.2.3 Congregate Care/Nursing Home TUMF Calculation Worksheet

Enter Total Number of Beds	x	81.1	=	Enter this value as (part of) the <u>Total Gross Floor Area of Service Buildings</u> in Worksheet A.2.1
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Worksheet A.2.4 Mini-Warehouse/Rental Storage TUMF Calculation Worksheet

Enter Total Site Area in Acres	x	6,647.3	=	Enter this value as (part of) the <u>Total Gross Floor Area of Industrial Buildings</u> in Worksheet A.2.1
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Worksheet A.2.5 Golf Course TUMF Calculation Worksheet

1.	Enter Total Number of Holes	x	1,057.7	=		← <u>Total A</u>	
2.						Enter Total Gross Floor Area of Buildings (in square feet)	← <u>Total B</u>
3.	Enter the greater of Total A and Total B						← Enter this value as (part of) the <u>Total Gross Floor Area of Service Buildings</u> in Worksheet A.2.1

Worksheet A.2.6 Wholesale Nursery TUMF Calculation Worksheet

1. x 488.9 = ← Total A
Enter Total Site Area in Acres

2. ← Total B
Enter Total Gross Floor Area of Buildings (in square feet)

3. ← Enter this value as (part of) the Total Gross Floor Area of Industrial Buildings in Worksheet A.2.1
Enter the greater of Total A and Total B

Worksheet A.2.7 Retail Nursery TUMF Calculation Worksheet

1. x 2,118.8 = ← Total A
Enter Total Site Area in Acres

2. ← Total B
Enter Total Gross Floor Area of Buildings (in square feet)

3. ← Enter this value as (part of) the Total Gross Floor Area of Retail Buildings in Worksheet A.2.1
Enter the greater of Total A and Total B

Worksheet A.2.8 High-Cube Warehouse/Distribution Center TUMF Calculation Worksheet

	- 200,000 =		← Total A
Enter Gross Floor Area of Qualifying Building(s) (in square feet)			
	x 0.32 =		← Total B
Enter <u>Total A</u>			
	+ 200,000 =		
Enter <u>Total B</u>			
Enter this value as (part of) the <u>Total Gross Floor Area of Industrial Buildings</u> in Worksheet A.2.1			

Worksheet A.2.9 Winery Size TUMF Calculation Worksheet

← Total A Enter Gross Floor Area of Tasting Room and/or associated ancillary uses (in square feet)	← Total B Enter Total Gross Floor Area of All Buildings (in square feet)
- If <u>Total A</u> is less than 700 and <u>Total B</u> is less than 15,000, enter <u>Total B</u> value as (part of) the <u>Total Gross Floor Area of Industrial Buildings</u> in Worksheet A.2.1 - If <u>Total A</u> is greater than 700 and <u>Total B</u> is less than 15,000, enter <u>Total B</u> value in Worksheet A.2.10 - If <u>Total A</u> is greater than 700 and <u>Total B</u> is greater than 15,000, enter total square feet of winery uses only in Worksheet A.2.11. (Additional building square footage should be entered into A.2.1 as appropriate, i.e. hotel, restaurant, retail store, etc.)	

Worksheet A.2.10 Medium Winery TUMF Calculation Worksheet

Enter <u>Total B</u> from <u>Worksheet A.2.9</u>	x	1.38	=	← Total C Enter this value as (part of) the <u>Total Gross Floor Area of Industrial Buildings</u> in Worksheet A.2.1
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Worksheet A.2.11 Large Winery TUMF Calculation Worksheet

Enter <u>total square feet of winery uses only</u>	x	1.38	=	← Total C Enter this value as (part of) the <u>Total Gross Floor Area of Industrial Buildings</u> in Worksheet A.2.1
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**Worksheet A.2.12 Electric Vehicle Supply Equipment Charging Stations TUMF
Calculation Worksheet**

Enter <u>total number of</u> <u>publically accessible</u> ESVE units	X	14.9	=	Enter this value as (part of) the <u>Total Gross Floor Area</u> <u>of Retail Buildings in</u> Worksheet A.2.1	← Total C
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