Reinventing Redevelopment: EIFDs/CRIAs

June 27th, 2017

Agenda

- Basic overview of Tax Increment Financing Districts
- Demonstration of SCAG’s EIFD/CRIA Technical Assistance Application
- Demonstration of OppSites
- Overview of Metro’s TOD Grant Opportunity + Transit Supportive Toolkit
State Policy Direction:
Economic Shift From an Oil-Based Economy

- Businesses across the state must continue to incorporate GHG emissions reductions strategies into business models in response to legislative mandates such as AB 32, SB 375, SB 350, and most recent accelerations via SB 32 and AB 197, along with federal emissions & environmental legislation.

How California Has Pursued GHG Reductions so Far

- Sustainable Infrastructure Investments
- Energy-Saving Industrial Processes
- Renewable Energy Investments
- Cap and Trade Program
- Building Efficiency Design and Upgrades
- CEQA Analysis Changes from VMT to # of Trips

“Economic Development 2.0”
Gives Cities new Financing Tools

- Enhanced Infrastructure Financing Districts (EIFDs) (SB 628/AB 313)
- Community Revitalization and Investment Authorities (CRIAs) (AB 2/AB 2492)

- New financing tools provide the potential for cities to create specialized infrastructure districts which can ultimately fund sustainable infrastructure
- Encourage a regional approach by requiring multiple local agencies (cities, counties & special districts) to cooperate in order to use tax increment financing
- Once approved, these Districts can combine tax increment with other regional and state-authorized financing programs such as GGRF, Prop 1/84, PACE funds, etc.
  - EIFDs focus in infrastructure and public/private transactions
  - CRIAs similar with more stringent eligibility standards & focus on affordable housing
**EIFDs: New Deal-Making Paradigm in CA**

- Based on Infrastructure Financing District (IFD) law
- Enable tax increment financing for local/regional projects (purchase, construction, expansion, improvement, seismic retrofit, rehabilitation)
- District lifespan is 45 years to collect and spend property tax increment
- Any property with estimated useful life of 15+ years & of communitywide significance
- Managed by newly created Public Financing Authority (led by City or County) – board of 5+ members, includes at least 2 public members
- EIFD activities directed by PFA-adopted Infrastructure Financing Plan (IFP)
- **No public vote** required to create district
- 55% landowner or registered voter election needed for tax increment bonds
- No school district increment allowed
- Does not increase property taxes

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**CRIA (AB 2) Overview**

**Community Revitalization Investment Authority (CRIA)- effective January 2015**

- Restores redevelopment authorities to disadvantaged communities
  - Carries out provisions of Community Redevelopment Law
- Formed by City or County (Special Districts allowed if CRIA is Joint Powers Authority) – 5+ member board, including at least 2 public members
- Can fund projects for economic revitalization in disadvantaged communities
- Allows projects to be financed by bonds serviced by tax increment
  - 30 years to issue debt; 45 years to repay indebtedness
- Powers of eminent domain granted to CRIAs for first 12 years of district
- No voter approval for formation or bond issuance, but subject to majority protest at adoption and every 10 years
- **25% affordable housing set-aside**
- **Must meet qualification requirements**
CRIA Eligibility / Qualification

- **Qualifying Conditions of a Community Revitalization Area:**
  - 80% of land (calculated by census tracts or block groups) must have median household income less than 80% of statewide / countywide / citywide median
  - Must exhibit at least three of the following conditions:
    1. Non-seasonal unemployment rate 3 percentage points higher than statewide median
    2. Crime rates are 5% higher than statewide median
    3. Deteriorated or inadequate infrastructure
    4. Deteriorated commercial or residential structures
- **Note:** AB 2492 (NEW) ability to qualify under CalEPA designation as disadvantaged community (based on geographic, socioeconomic, public health, environmental factors)
- Like EIFD, agency must have Finding of Completion from DOF and comply with all orders from Controller

Types of Projects EIFDs & CRIAs Can Fund

- Industrial Structures
- Aff. Housing / Mixed Use
- Transit Priority Projects
- Wastewater/Groundwater
- Light / High Speed Rail
- Civic Infrastructure
- Parks & Open Space
- Childcare Facilities
- Brownfield Remediation
EIFDs & CRIAs – Diverse Funding Approach

- Can use multiple funding sources with tax increment:

- Potential to apply State funding sources:
  - Proposition 1 bond funds
  - Cap-and-trade proceeds

- Federal & State Grants
  - Greenhouse Gas Reduction Funds
  - Federal DOT/EPA/DOE funding programs

- Other Potential Funding Sources:
  - Property tax revenue including RPTTF
  - Vehicle license fee (VLF) prop. tax backfill increment
  - Development agreement / impact fees
  - City / county / special district loans
  - Benefit assessments (e.g. contribution from CFD)
  - Private investment

Cooperative Districts = Greater Funding Capacity

- Example: $150 million project (today’s dollars) developed over 10 years
- **Scenario 1**: EIFD with 15 total cents of property tax capture
- **Scenario 2**: EIFD with 25 total cents of property tax capture
- In this scenario, the EIFD’s cumulative property tax revenues accelerate from approximately $15.6 million to $26.0 million over 45 years

**45-Year Cumulative Property Tax Increment With 15 Cent Share versus 25 Cent Share**
Thank You / Questions?

Kosmont Companies
1230 Rosecrans, Suite 630
Manhattan Beach, CA 90266
Telephone: (424) 297-1070
www.kosmont.com

Agenda

- Basic overview of Tax Increment Financing Districts
- Demonstration of SCAG’s EIFD/CRIA Technical Assistance Application
- Demonstration of OppSites
- Overview of Metro’s TOD Grant Opportunity + Transit Supportive Toolkit
### SCAG Objective and Screening Criteria

**SCAG Objective**: Provide member cities with initial screening to determine whether a sustainable infrastructure project could utilize EIFD or CRIA for funding/financing.

**Primary Screening Criteria and Sample Required Data**:

<table>
<thead>
<tr>
<th>Screening Criteria</th>
<th>Sample Required Data</th>
<th>Relevant SCAG Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. EIFD/CRIA Successor Agency Prerequisites</td>
<td>• Receipt of Finding of Completion from DOF</td>
<td>• N/A (DOF website)</td>
</tr>
<tr>
<td>2. Economic Development Potential</td>
<td>• Planned projects</td>
<td>• GIS land use data</td>
</tr>
<tr>
<td></td>
<td>• Existing parcel values</td>
<td>• Parcel data by County</td>
</tr>
<tr>
<td>3. Current Zoning and Density in Project Area</td>
<td>• Existing zoning / specific plan boundaries</td>
<td>• GIS data, incl. general / specific plans, existing land use</td>
</tr>
<tr>
<td>4. Project Location and Infrastructure Needs</td>
<td>• Location in High-Quality Transit / Transit Priority Area</td>
<td>• GIS data, HQTA / TPP / TPA maps</td>
</tr>
<tr>
<td>5. Potential Infrastructure Financing Solutions</td>
<td>• Property tax capture rate</td>
<td>• Property tax data (in process)</td>
</tr>
<tr>
<td></td>
<td>• Eligibility for grant funding</td>
<td>• GIS data, TPA, Disadv. Comm. maps</td>
</tr>
<tr>
<td>6. CRIA Eligibility</td>
<td>• Income / crime / unemp.</td>
<td>• Socioeconomic data</td>
</tr>
<tr>
<td></td>
<td>• Disadv. Comm. designation</td>
<td>• GIS data, incl. Disadv. Comm. maps</td>
</tr>
<tr>
<td>7. Technical Screening</td>
<td>• Former RDA project areas</td>
<td>• N/A (City finance departments)</td>
</tr>
<tr>
<td></td>
<td>• Existing ROPS obligations</td>
<td></td>
</tr>
</tbody>
</table>

### Example Required Data: Property Tax Increment Capture

<table>
<thead>
<tr>
<th>Amount of Increment Captured (per $1)</th>
<th>LA</th>
<th>Orange</th>
<th>San Bernardino</th>
<th>Riverside</th>
<th>Ventura</th>
<th>Imperial</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 Cents+</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>20 to 25 Cents</td>
<td>7</td>
<td>0</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>15 to 20 Cents</td>
<td>10</td>
<td>11</td>
<td>9</td>
<td>7</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>10 to 15 Cents</td>
<td>23</td>
<td>14</td>
<td>5</td>
<td>8</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>5 to 10 Cents</td>
<td>47</td>
<td>4</td>
<td>1</td>
<td>8</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>≤ 5 Cents</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>88</strong></td>
<td><strong>34</strong></td>
<td><strong>24</strong></td>
<td><strong>28</strong></td>
<td><strong>10</strong></td>
<td><strong>7</strong></td>
</tr>
</tbody>
</table>

- **69 cities capture 15 cents or higher**: Generally able to form district on their own
- **122 cities capture less than 15 cents**: May have to find partners or supplemental funds

*Source: Hdl Companies*
SCAG EIFD/CRIA Technical Assistance Application

http://arcg.is/2mMKdnK

Does your neighborhood need better infrastructure?

Over the past 3 years, the State of California passed Senate Bill 698, Assembly Bill 2, and Assembly Bill 2592. These bills defined and authorized the creation of what are known as

Enhanced Infrastructure Financing Districts (EIFD)

and

Community Revitalization and Investment Areas (CRIA)

Upon the establishment of these boundaries, local jurisdictions can use the property tax increments from real estate within those areas to finance various infrastructure improvements. Infrastructure improvements may include:

- Transit priority projects
- Projects to implement a Sustainable Communities Strategy
- Affordable housing
- Economic revitalization

Does my area qualify?

In 2017, the Southern California Association of Governments (SCAG) developed this GIS web tool using the ArcGIS Online Story Maps platform to translate the criteria in state legislation into easily digestible maps to allow staff from SCAG’s 39 local jurisdictions to say if their infrastructure project areas are eligible for EIFD or CRIA declaration.

Click on a tab above to begin.
EIFD Project Screening Worksheet

To be used in conjunction with SCAG's EIFD/CRIA Technical Assistance Application;
http://cria.scag.ca.gov/ to assess a project area for its eligibility to be declared an EIFD.

*Requird

Email address *

Your email:

In which SCAG county is the project located? *

- Imperial
- Los Angeles
- Orange
- Riverside
- San Bernardino
- Ventura

In which city is the proposed project located? (If in unincorporated county land, enter "Unincorporated") *
Economic Development Potential

Districts are more valuable when assessed value growth from new development is significant compared to existing assessed value. Use this map tool to estimate existing assessed value within a designated geographic area.

Map data to the right will NOT display until you zoom in. Enter an address into the search bar on the top to zoom into a particular property and its surroundings.

The Summary and Select widgets will show the total assessed value of properties in a particular area and the estimated forward of property tax revenue they will generate for a jurisdiction. Use the Summary widget for a general overview, and the select widget for a specific set of parameters.

Successor Agency Prerequisites

Former Redevelopment Agency Obligations

Current Zoning and Density

Specific Plans

Developable Land
Economic Development Potential

Districts are measurable when assessed value growth from new development is significant compared to existing assessed value. Use this map tool to estimate existing assessed value within a designated geographic area.

Map data in the right will NOT display until you zoom in. Enter an address into the search bar on the top to zoom into a particular property and its surroundings.

The Summary and Select widgets will show the total assessed value of properties in a particular area and estimate the amount of property tax revenue they will generate for a jurisdiction. Use the Summary Widget for a general overview, and the Select widget for a specific set of parcels.

Successor Agency Prerequisites

Former Redevelopment Agency Obligations

Current Zoning and Density

Specific Plans

Developable Land
Socioeconomic Criteria

Deteriorated or Inadequate Infrastructure

This map only features data for the City of Los Angeles. Street conditions will not show up if you zoom in to the neighborhood level.

Zoom to an area of interest and click a census tract to see its attributes.

Forecast for 2022, 80% of the areas in the EID CRIAs must satisfy three of the following four conditions.

1. A nonseasonal unemployment rate that is at least 2 percentage points higher than the state average per season within each area.
2. Crime rates that are at least 5 times higher than the state average crime rate for violent or property crimes.
3. Stormwater or inadequate infrastructure, including streets, sidewalks,ueva supply, sewer treatment, or processing, and public.
4. Deteriorated commercial or residential structures.

Streets down in red satisfy criterion 3. Note that there may be other types of deteriorated or inadequate infrastructure not shown on this map that may satisfy this criterion.

Disadvantaged Areas

As alternatives to the qualifications under "Socioeconomic Criteria" and "Deteriorated or Inadequate Infrastructure" above, an area may qualify if it meets one of the following criteria.

1. They are within the territory of a community service district as described in Section 37711 of the Water and Power: Code (An L.A.-Calif. Law Enforcement).
2. They are within a zone within an area primarily characterized by deteriorated or inadequate infrastructure and structures.

Areas highlighted in purple satisfy criterion 1.
Thank you!

Kimberly Clark, Regional Planner Specialist
clark@scag.ca.gov
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1. Welcome
2. Program Overview
3. Transit Supportive Planning Toolkit & Application
4. TOC TIF Application and SCAG Demonstration
5. Lessons Learned
6. Q&A
History and Background

> Measure R and M – rapid system expansion
> June 2011 – TOD Planning Grant Program launched
> Opportunity to promote Transit Supportive Planning
> Remove obstacles to regulatory change
Transit System: Existing + Measure R Projects

Existing + Measure R:
181-191 stations
218+ miles

We’re Growing! Measure M Project
Map
Program Objectives

> Assist local governments to adopt Transit Supportive Regulatory plans
> Improve mobility, increase transit utilization
> Reduce GHGs through infill development
> Support and implement sustainable development principles

Eligible Applicants

- Cities and the County of Los Angeles with land use regulatory jurisdiction:
  > Within ½ mile of existing, planned or proposed Metro Rail or Bus Rapid Transit stations and adjacent transit corridors; and/or
  > Within ½ mile of Metrolink Stations in LA County
Eligible Activities (R1-R4)

- Examples of specific regulatory documents:
  > New or amended general plans, specific plans, zoning ordinances, overlay zones
  > Related environmental clearance documents

- Areas of study might include:
  > Land use, density/height, parking requirements, bike/pedestrian access, public realm improvements

Funding Awarded to Date

- Four Rounds, $21.6 million, 35 grants, 31 cities
  > Round 1: $4,806,000 (December 2011)
  > Round 2: $1,000,000 (December 2012)
  > Round 3: $9,443,997 (February 2013)
  > Round 4: $6,352,000 (January 2015)
Funding Awarded to Date

| Program funding $3.1 million |
| Transit Supportive Planning Toolkit |
| Transit Oriented Communities Tax Increment Financing (TOC TIF) Pilot Program |
| Updated Grant Applications for TOD and TOC TIF |
Updated Guidelines

- Guidance on Metro’s definition of Transit Supportive Planning
- Quarterly briefings
- Coordination on draft work products
- Procedures on project delays

Grant Eligible Use of Funds

1. Regulatory Plans/Documents including:
   - General Plan updates; Specific Plans; TOD Districts, Zoning Ordinances; other forms of Overlay Zones
   - Related environmental clearance documents
   - Studies that support directly or indirectly regulatory plans

2. TOC TIF Feasibility Studies
   - EIFD/CRIA studies
Grant Eligible Use of Funds

Examples of eligible activities:
- Staff and third party consulting costs
- Direct overhead/administrative costs
- Community outreach and related costs for food and non cash incentives

Examples of non-eligible activities:
- Indirect costs such as equipment, vehicles, office leases, food
- Staff overtime, staff mileage, use of pool vehicles
- Construction activities

Transit Supportive Planning Toolkit
And Grant Application
Transit Supportive Planning Toolkit (Toolkit)

> Resource for local governments to advance Transit Supportive Planning holistically

> Includes locally relevant strategies, best practices, tools to:
  – Increase Transit ridership
  – Reduce VMT
  – Advance sustainable development practices

> Over 100 case studies
> [metro.net/projects/tod-toolkit/](http://metro.net/projects/tod-toolkit/)
> Funded by the Strategic Growth Council
10 Elements of Transit Supportive Places

1. Compact Design
2. Commercial Stabilization, Business Retention & Expansion
3. Complete Neighborhoods
4. Site Layout, Parking Layout & Building Design
5. Affordable Housing
6. Street & Network Connectivity
7. Transit Prioritization, Accessibility & Area Design
8. Parking Management
9. Transportation Demand Management
10. Pedestrian & Bicycle Circulation

Complete Neighborhoods

Complete neighborhoods refer to places where people have safe and convenient access to residential, commercial goods and services, a range of transportation options, and community services.

Strategies
- Off-leash dog parks
- Create new green space
- Support community-serving uses, such as child care and health services
- Support a mix of single-family homes and multi-family
- Increase tree cover to at least 30% or more
- Balance jobs and housing

Effectiveness
- Off-leash dog parks
- Create new green space
- Support community-serving uses, such as child care and health services
- Support a mix of single-family homes and multi-family
- Increase tree cover to at least 30% or more
- Balance jobs and housing
How the Tools are Organized

Four Categories of Tools
- Land Use and Planning
- Environmental Tools
- Economic Tools
- Outreach Tools

Includes:
- Description and Alignment with Best Practice Category
- Strategies (potential strategies to support tool)
- Outcomes
- Links to Case Studies

Example: Transportation and Parking Tools

- Bike-Share Programs
- Bike Stations
- Car-Share Programs
- Innovative Parking Design
- Parking Benefit Districts
- Parking Minimums and Maximums
- Parking Management Districts
- Shared Parking
- TDM Ordinance
- Traffic Calming
- Transportation Master Plans
Tools

Parking Management Districts

Best Practice Category:

In This Section
- Description
- Characteristics
- Planning Tools
- Environmental Tools
- Resource Tools
- Outreach Tools

Relevant Programs
- Other Metro Programs & Plans
  - 2000-2005 Program
  - Active Transportation Strategic Plan
  - Freeway Maintenance Plan
  - Metro-Cities Plan Toolkit
  - WMRC Regional Transit Authority
  - Oversight & Accountability Framework

Planning & Outreach
- Planning Tools: Land Use/Planning
- Planning Tools: Transportation and Parking
- Planning Tools: Urban Design
- Economic Tools: Financing
- Transit Support

CASE TOOLS

Example: Community Engagement
Best Practices

1. Craft a clear plan
2. Foster partnerships
3. Engage and maintain contact with stakeholders
4. Use multiple modes of communication
5. Make it fun
6. Reframe the discussion
7. Make it personal
8. Use visual tools to engage

Case Study: Vision
Lennox
Using the Toolkit

1. Go to https://www.metro.net/projects/tod-toolkit/

2. Review the 6 benefits (making the case)

3. Identify which of the 10 characteristics of Transit-supportive Development are a) directly related to your project, b) secondarily related, c) don’t apply.
TOD Completing the Application

Section 1: Project Scope/Description (10 points)

1. Project Area/Targeted Communities:
   a. Identify transit lines and stations, and its significance to local community, transit connectivity, access and ridership
   b. Barriers to public transportation usage and multi-modalism
   c. Prominent community equity concerns

2. Project area map illustrating ½ mile radius or transit corridors
Section 2: Existing Conditions and Regulatory Constraints (10 points)

1. Using 10 characteristics, provide clear and specific description of proposed project area’s existing conditions and regulatory constraints to creating an equitable transit supportive place.

2. What existing regulatory constraints preclude jurisdiction from addressing identified equity issues?

Section 3: Proposed Regulatory Changes and Impact (35 points)

1. Using Toolkit, describe specific regulatory documents that will require revision/new regulatory documents that will be developed.

2. Describe how proposed project will address, mitigate, and/or improve challenges described. How will the project accomplish goals set forth in Toolkit for creating transit supportive places?
Section 4: Public Participation (20 points)

1. Describe proposed project’s targeted communities and existing population. Identify key stakeholders and describe experience working with these groups or how they will be engaged in the process.

2. Outline a comprehensive, meaningful public participation and outreach plan that will bring the proposed regulatory changes forward.

Section 5: Future Project Implementation (10 points)

1. Describe existing opportunity sites: parcels of land that could be developed/redeveloped using Toolkit principles.

2. Describe long-term implementation plan for building a successful transit supportive community after grant-funded regulatory changes are adopted.
Section 6: Staffing and Administrative Plan (15 points)

1. Project Tasks, Schedule, and Budget
2. Project Management
3. Prior Grant Performance (if applicable)

> Signature Page
> Attachment A – Tasks, Schedule, and Budget
> Attachment B – Task Description, Approach and Deliverables
> Maps of proposed project area
Transit Oriented Communities
Tax Increment Financing Pilot Program

TOC TIF Pilot Program

> Partnership with Southern California Association of Governments (SCAG)
  > Technical Assistance Application

> Initial Feasibility Studies
  > Community Revitalization and Investment Authority (CRIA) and
  > Enhanced Infrastructure Financing District (EIFD)

districts and related community visioning
TOC TIF Background

> Redevelopment Dissolution in 2012
> 2014: SB 628/AB 313 (amended) legislation created EIFDs
> EIFDs issue TIF bonds to fund certain projects:
  > Public works infrastructure
  > Environmental remediation and sustainable economic development
  > Transit priority
  > Affordable housing

TOC TIF Background

> EIFDs are separate entities, formed through JPA that consist of cities, counties, and special districts
> EIFDs is governed by separate entity called Public Financing Authority (PFA) comprised of:
  – Majority of members from participating taxing entities (e.g. city, county, and special districts)
  – Minimum of two public members
> EIFDs and CRIA can only be formed by entities whose successor agencies have received a Finding of Completion from DOF
TOC TIF Background

> 2015: AB 2/AB 2492 (amendment) legislation created CRIA
> CRIA may issue bonds backed by combined property tax increment revenues & complementary funding sources
> CRIA funds same projects as EIFD, but
  > Includes land acquisition/sale, and
  > Requires 25% of tax increment revenue be dedicated to affordable housing
> CRIA is formed in two ways:
  1. JPA that can include city, county and special district
  2. By a city, county or city and county directly
    - CRIA areas must qualify via measures of income, crime, unemployment, deteriorated structures, and other measures

TOC TIF Pilot Eligible Applicants

• Cities and the County of Los Angeles with land use regulatory jurisdiction:
  > Within ½ mile of Metro Rail, Bus Rapid Transit or Metrolink Stations (in LA County) stations and adjacent transit corridors;
  > Have adopted or are currently developing a transit supportive regulatory planning document; and

Measure favorably against SCAG’s online EIFD/CRIA Technical Assistance Application
SCAG Technical Assistance Application

> http://arcg.is/2mMKdnK

> Applicants must meet State EIFD/CRIA criteria to complete Part 2 of Metro TOC TIF application

Completing the Pre-Application

Part 1: Litmus Test Screening Criteria

1. Successor Agency Prerequisites
   • If overlap with former Redevelopment Agency parcels, provide evidence of receipt of Finding of Completion from Dept. of Finance (DOF)
   • Provide most recent Recognized Obligation Payment Scheduled (ROPS), approximate amount of outstanding obligations ($), and date of expiration of last obligation

2. Economic Development
   Provide total assessed value of parcels in the
3. Zoning and Density

• Adopted Transit Supportive Regulatory document encompasses the study area or one underway

4. Potential Financing Solutions

• Tax Increment Capture: Indicate rate of city capture for every dollar ($1) or property tax within project area; also identify other potential sources of revenue (e.g. property tax in-lieu of VLF, sales tax grants, other)

5. Community Revitalization Investment Authority (CRIA) Qualification

– 80% of the land in project area by census tracts, block groups, or both have annual median household income less than 80% of either statewide, countywide or citywide median, AND

– Three (3) of the following four (4) conditions:
  • 80% of the land in project area has a non-seasonal unemployment rate at least 3% higher than statewide average
  • 80% of the land in project area has crime (violent or property offenses) rate at least 5% higher than statewide average
  • 80% of the land in project area has deteriorated or inadequate infrastructure i.e., sewer treatment, sidewalks, water supply, parks
  • 80% of the land in project area has deteriorated commercial or residential structures
5. Community Revitalization Investment Authority qualification (Cont’d)

• As alternatives to the criteria on the previous page, **EITHER** census tracts within project area are Disadvantaged Community census tracts as described in Section 39711 of the Health and Safety Code (per SB 535, CalEPA CalEnviroScreen)

OR

• Census tracts within project area are located on

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**TOC TIF Completing the Application**

Part 2: Project Description and Stakeholder Engagement (*100 points*)

1. Project Description (30 points)
2. Zoning and Density (40 points)
3. Stakeholder Engagement (30 points)
Part 2: Project Description \((30\text{ points})\)

1. Project Description
   
a. Project Area/Targeted communities
   
b. TIF District improvements to support increased Transit access and ridership based on existing or proposed development

Part 2: Zoning, Density, and Implementation \((40\text{ points})\)

1. Regulatory plan’s policy goals that aligns with the 10 Characteristics of Transit Supportive Planning Toolkit

2. Environmental Clearance

3. Infill development potential
TOC TIF Completing the Application

Part 2: Stakeholder Engagement (30 points)

1. Community and Stakeholder Support
2. Outreach Plan
3. Underserved Communities Engagement Process

TOC TIF Completing the Application

Part 3: Staffing and Administrative Plan

1. Project Tasks, Schedule, and Budget
2. Project Management
3. Prior Grant Performance (if applicable)
TOC TIF Completing the Application

> Application Form and Signature Page
> Attachment A – Tasks, Schedule, and Budget
> Attachment B – Task Description, Approach and Deliverables
> Maps of proposed project area

Round 5 Timeline

> June 5: Application Package Released
> June 7, 20, 22 & 27: Application workshops
> July 31: Applications Due
> Late August – Staff Funding Recommendations
> Fall 2017 – Metro Board Approval
> Early 2018 – Grant Agreements Executed
  > 36-month performance period
Lessons Learned

Application Lessons Learned and Tips

Main project deliverable must be regulatory change

Proposed activities should be tied back to the overall regulatory plan
2. Project titles should describe the project

The title will be on several documents and presented at meetings for years to come so make it clear.

3. Use the evaluation criteria to your advantage

Maximize points awarded by reviewing corresponding evaluation criteria closely when responding to questions.
Application Lessons Learned and Tips

4

Follow the application instructions

Carefully review the instructions – we mean what we say

5

Use the attachments provided

Do not alter the format or formulas
Application Lessons Learned and Tips

Be concise in your responses
Avoid repetition and utilize the space provided

Develop a reasonable budget
Applications will be evaluated on reasonableness and efficiency of proposed expenditures
Application Lessons Learned and Tips

Don’t forget about yourself
Staff labor is an eligible expense

Plan for the unexpected
Develop realistic implementation schedules for tasks within the 36-month performance period
Application Lessons Learned and Tips

Contact Metro staff early and often

Staff is available to answer questions and provide guidance to prospective applicants

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Thank You!

**Desiree Portillo-Rabinov**
Manager, Transportation Planning
213.922.3039
PortilloRabinovD@metro.net

**Elizabeth Carvajal**
Sr. Manager, Transportation Planning
213.922.3039
CarvajalE@metro.net
metro.net/projects/tod/
metro.net/projects/tod-toolkit/