PAOT and Impact Assessment Policy Recommendations
April 15, 2009

PAOT Ad Hoc Committee

- Mayor Wendy Sugimura
- Mayor Pro Tem Neil McCarroll
- Tom Cage
- Dan Dawson
- Jim Smith
- Bill Taylor

- 8 Meetings: December 2008 – March 2009

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PAOT Ad Hoc Committee

Committee Purpose

"*To make policy recommendations, for adoption by Town Council, about how to evaluate land use decisions using PAOT, and how to consider associated impacts in order to achieve General Plan goals and the "triple bottom line."*"

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PAOT Ad Hoc Committee

Committee Objectives

1. Describe and define PAOT.
2. Define the building block assumptions, calculus, and format for PAOT.
3. Keep and reporting the running total for PAOT.

PAOT Model

4. Determine how to evaluate the impacts of PAOT.
5. Apply the methodology to the evaluation of permit applications and other planning documents.
6. Develop a key indicators framework for an annual Community Assessment/Indicators Report.

Impact Assessment Framework

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PAOT Definition

1. A number of people, based on per unit occupancy of residential and lodging units.
2. The associated impacts of that number of people.

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PAOT/Buildout Model

- Building blocks based on 2007 GP PAOT Methodology and Assumptions
- Updated model is parcel and GIS-based
- Includes documentation of all methodology steps, fixed data inputs and assumptions
- Results are transparent and reproducible

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PAOT/Buildout Model

A. Fixed Data Inputs
- Consists of Known Information and "Givens"
  - What's on the ground now
  - What's under construction
  - What we know about approved projects (Master Plans, Specific Plans, Entitlement)

B. User-Defined Assumptions
- Applied to future development and redevelopment
- Assumptions are **not policy**
- Assumptions **can be changed**
- Assumptions **will be updated** over time
- Accuracy of assumptions **will improve over time**

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PAOT/Buildout Model

Model Steps
1. Existing Development
2. Approved Projects
   - Master Plans/Specific Plans
   - Entitled Projects
3. Development of Vacant Land
   - Single-Family Residential
   - Multi-Family Residential and Commercial
4. Redevelopment of Existing Developed Parcels
5. Apply population per unit assumptions

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PAOT/Buildout Model

Primary assumptions:

- Buildout % of Master/Specific Plan Areas
- Buildout % of Entitled Projects
- Buildout % and Density of Vacant Parcels
- Redevelopment % and Density of Existing Developed Parcels
- Community Benefits Density Bonuses
- Housing Density Bonuses
- Occupancy Factors/Multipliers

PAOT/Buildout Model

Model Run #1: Community Benefits Bonus Excluded (Lodging @ 40 rooms/acre)

	Unit-Room Equivalents		PAOT	
Build-out Stage	Unit-Room Equivalents	Running Total	All @ 3.5	Existing @ 3.5 Future @ 3.0
Existing	10,331	10,331	36,159	36,159
Master Plan / Specific Plan	3,670	14,001	49,004	42,003
Entitled Development	642	14,643	51,251	43,929
Vacant : Single-Family	374	15,017	52,560	45,051
Vacant : Multi-Family / Commercial	457	15,474	54,159	46,422
Redevelopment	343	15,817	55,360	47,451
TOTAL	**15,817**		**55,360**	**47,451**

Model Run #2: Community Benefits Bonus Included (Lodging @ 80 rooms/acre)

	Unit-Room Equivalents		PAOT	
Build-out Stage	Unit-Room Equivalents	Running Total	All @ 3.5	Existing @ 3.5 Future @ 3.0
Existing	10,331	10,331	36,159	35,849
Master Plan / Specific Plan	3,670	14,001	49,004	42,003
Entitled Development	642	14,643	51,251	43,929
Vacant : Single-Family	374	15,017	52,560	45,051
Vacant : Multi-Family / Commercial	553	15,570	54,495	46,710
Redevelopment	542	16,112	56,392	48,336
TOTAL	**16,112**		**56,392**	**48,336**

PAOT/Buildout Model

2007 General Plan PAOT Estimate:

15,215 to 16,970 Units

52,796 to 58,886 PAOT (3.47 persons/unit)

2009 PAOT Model Run Reports Estimate:

15,817 to 16,112 Units

52,617 to 56,392 PAOT (3.0 / 3.5 persons/unit)

PAOT/Buildout Model

Key Findings/Recommendations

- Use PAOT/buildout model as a way to keep the "running tab" of units and PAOT.
- Assumptions used to calculate units and PAOT can and will change over time
- PAOT calculation is an estimate - less accurate than a unit-based measure, because per unit occupancy is likely to fluctuate.

Impact-Based Assessment

PAOT Definition:

- A number of people, based on per unit occupancy of residential and lodging units. (The Model)
- **The associated impacts of that number of people (Impact Based Assessment)**

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Impact-Based Assessment

The PAOT "number" by itself does not indicate if we are achieving our Community Vision.

- Are we managing our growth in order to achieve our Community Vision?
- Is new development mitigating its impacts and contributing to our Community Vision?
- Simple criteria are needed to allow evaluation of impacts important to the community – some are quantifiable, some are qualitative.

All aspects of "triple bottom line" (social, environmental and economic) should be reflected.

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Policy Recommendations

1. Move from PAOT-based (numeric) evaluation to impact-based assessment

- All PAOT does not have an equal impact; location and type of development matter.
- Use General Plan EIR threshold impacts that define "quality of life" at 52,000 PAOT.
- Align General Plan and Municipal Code through a comprehensive code update.

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Policy Recommendations

2. Set policies and standards through community plans that clearly articulate impacts and objectives:

- Use community planning (e.g. NDPs, Specific Plans, Master Plans and other documents) to establish policies and standards.
- Develop policies and standards tied to impact thresholds in GP EIR at 52,000 PAOT.
- Incorporate public input.

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Policy Recommendations

3. **Adhere to Adopted Policies and Standards!**
- Codify/adopt policies and standards (in district plans and other documents), and apply them consistently in project assessment.
- Update the Municipal Code for consistency with the General Plan.

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Policy Recommendations

4. **Apply the PAOT Model to quantify progress towards buildout:**
- Use PAOT Model as a reporting tool, alongside impact assessment.
- Do not permit PAOT reporting to determine or justify a particular site or project density.
- Follow model steps outlined, including complete reporting of assumptions, method, and data limitations.

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Policy Recommendations

5. **Respect the intent of the policies:**
- PAOT/Impact Assessment Policies are <u>not </u>intended to:
  - Supersede/replace zoning & GP development limits,
  - Automatically grant discretionary density increases,
  - Justify or encourage applications for density above established limits, or
  - Imply that additional density is appropriate/desirable even if impact thresholds are not exceeded.
- Council and Planning Commission continue to consider projects in light of all information, and on their merits

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Policy Recommendations

6. **Complete Needed Follow-up Tasks:**
- Study/Update Impact Thresholds, including adoption of revised CEQA thresholds.
- Develop and Implement Project Impact Evaluation Criteria and methodology.
- Complete and codify District Plans
- Consider and incorporate outcomes of incentive zoning and related policy development, and other comprehensive planning (e.g. Trails, Rec, Parks, Mobility Plans).

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Policy Recommendations

PAOT Buildout Model Recommendations:

- Use the model to track & report progress to buildout
- Provide model output as a range:
  - With and without "community benefits" bonus (40/80 rpa)
  - Per unit occupancy at 3.5 (all existing/future); and 3.5 (existing) & 3.0 (future) per unit.
- Require for projects requesting legislative changes and/or discretionary density.
- Regular data updates.
- Study/update occupancy factors as staff time/budget allow.

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Questions?