The Durham-Chapel Hill TOD Framework: Scope of Work

SUMMARY

GoTriangle, the regional transit agency for the Research Triangle region of North Carolina, including Raleigh, Durham, and Chapel Hill, **seeks a consultant or team of consultants to provide professional services to advance land use planning activities for transit-oriented development** around light rail stations proposed for the Durham-Orange Light Rail Transit (DOLRT) project.

This work will be conducted in close coordination with two partner jurisdictions: the City of Durham and the Town of Chapel Hill, and with participation from the region's lead coordinator of local government initiatives, the Triangle J Council of Governments (TJCOG).

BACKGROUND

Recent Census data reveals that the Durham-Chapel Hill MSA is among the fifteen fastest-growing MSAs in the top 100 metropolitan areas by population in the United States. While people from around the United States and the globe are moving to the area attracted by employment opportunities and a high quality of life, the challenges of fast growth are asserting themselves in the community. Travel times on roadways are getting longer and more unpredictable at rush hour at a rate significantly faster than population growth.

As a response to these challenges, the municipalities of Durham and Chapel Hill, along with their respective county governments, Durham County and Orange County, passed a ½-cent sales tax in the years 2011 and 2012 to invest in a significantly improved transit system including bus expansion and a 17-mile light rail line between UNC Hospital in Chapel Hill and Alston Avenue in Durham. GoTriangle has been charged with implementing the light rail project and regional bus service improvements. Local transit providers Chapel Hill Transit and GoDurham have implemented local bus service improvements since the positive vote. Detailed information about the light rail project can be found at http://www.ourtransitfuture.com/

To maximize the benefits of the region's investment in the light rail line, Durham and Chapel Hill have embarked on several initiatives to focus growth in station areas along the DOLRT line. These efforts have included new incentives for density bonuses related to affordable housing, the development of form-based zoning districts, development agreements, and plans for station area bicycle and pedestrian infrastructure.

The challenge faced by both Durham and Chapel Hill is that market-driven development in both communities, and particularly along the DOLRT corridor, is moving faster than the planning staffs of the two communities have capacity to address for maximum public benefit. The Durham-Chapel Hill TOD Framework is intended to add consultant resources to land use planning and policy efforts to bring station area regulations to a

level of readiness that will encourage the types of development the community desires in station areas while also addressing social goals such as affordable housing and bicycle and pedestrian access.

Durham, Chapel Hill, and GoTriangle seek proposals for the following TOD planning activities.

SCOPE OF WORK

[S] = denotes work by local government, GoTriangle and/or TJCOG staff
[C] = denotes work by consultant
[B] = denotes work by both local government, GoTriangle and/or TJCOG staff and consultant

The consultant's cost estimate should reflect the fact that certain tasks are specified to be completed by LOCAL STAFF ALONE, and that other tasks are specified to be completed by the consultant WORKING WITH LOCAL STAFF.

I. Community Educational Activities
   a. [C] TOD 101 Workshops: One community-oriented, participatory event in both Durham and Chapel Hill covering:
      i. What is Transit-Oriented Development?
      ii. What benefits does TOD offer?
      iii. How can community goals be addressed in TOD planning?
      iv. Consultant should propose new ways of engaging community beyond the public workshop/hearing format. Multimedia? Social media? Online forums? Need to reach people outside of the "hold-a-meeting-they-come-to-us" channel.
   b. [C] A similar presentation targeted to
      i. Elected officials at:
         1. Durham City Council,
         2. Durham County Commissioners
         3. Chapel Hill Town Council
      ii. Advisory Boards
         1. [C] Chapel Hill
         2. [S] Durham
      iii. Notes: consultant should provide a cost per presentation for presenting material. For costing, expect staff to handle logistics and consultant to handle content
   c. [C] A final presentation based on this outreach that staff of GoTriangle, Durham, and Chapel Hill can continue to share with community groups over time
   d. [B] A "Lender Conference" to introduce local lending institutions to specifics of lending on TOD projects, success stories from other locations [potential partners: ULI, credit unions, local banks]
   e. [B] A TOD Developer Conference and/or kickoff event

II. Economic Analysis and Infrastructure Funding Activities (Including Value Capture Assessment)
   a. [C] Conduct Economic Market Analysis of the corridor, focusing on the various submarket differences between different station areas
      i. How much development can each station area expect in 5 years, 10 years, 20 years? What can reasonably be absorbed in each station area?
      ii. Market potential by subcategory (office, retail, residential, institutional, etc) by station area
      iii. The market analysis methodology should be easily replicable so that it can be conducted again on regular intervals (i.e. every 1-2 years)
   b. [S] Identify appropriate Value Capture tools in each municipality under current state law
      i. [S] List of things that are NOT possible (David Boyd leads) and explanations of why they are not.
         1. Example: legislation prohibits
         2. Example Local Government Commission practice prohibits
   c. Assess the potential for Value Capture at each station area
      i. [S] Total value capture stream available from VC district initiation to 2040.
      ii. [S] Ways to apportion potential Value Capture revenue among:
         1. DOLRT project debt paydown
         2. Affordable Housing funding
         3. Station Area Strategic Infrastructure
         4. Gen fund for municipalities
      iii. [C] Which other communities have used value capture for LRT project and goals like ours?
      iv. [C] Which rate did they use?
      v. [C] What type of money did they raise?
      vi. [C] How might you structure an implementable financial stram to deliver the goal projects (sidewalks, housing units, LRT debt payments, etc) on schedule?
      vii. [C] What is the unique position of each agency to best further implementation of our goals?
   d. [C] Analysis of tradeoffs between market feasibility and social goals- is there a point at which the affordable housing bonus incentives “break” the development cycle?
   e. [B] Communication to elected officials, private sector leaders, public about findings
   f. Development scenarios
      i. CommunityViz2 default place types, development status and constraint layers within station areas
         1. [S] Committed developments inventory

2. [B] Place type illustrations and examples (linked to consultant corridor sketch book and station area typology)

ii. [S] Other scenarios or modifications based on market assessment results, anchor institution plans/prospects and CV validation site information

iii. [B] Ridership and tax base implications of scenarios or failure to achieve planned TOD levels (based on consultant tasks related to market assessment and relationships from literature and inherent in the Triangle Regional Model ridership forecasting)

iv. [S] Development monitoring

1. Include 3rd party sources such as ApartmentXchange, etc.

g.

III. Creating Station Area Plans, Regulations and Policies

a. Chapel Hill

i. [B] Define Station Area boundaries/influence zones
ii. [B] Define elements of station area TOD
iii. [B] Develop specific station area plans
iv. [B] Update Future Land Use Map
v. [B] Recommend appropriate parking policies and ratios for TOD
vi. Develop street cross sections for Compact Design Districts
vii. [C] Develop recommendations for mix of residential-to-non-residential mix for TOD districts consistent with market study.
viii. [B] Conduct "developer testing" of new proposed regulations, including visiting developers from outside the region
ix. [B] Coordinate with the University of North Carolina at Chapel Hill on the status of the Main Campus, Smith Center and Friday Center LRT station area plans in the context of their ongoing Campus Master Plan process.

b. Durham

i. [S] Develop regulations for next generation of Compact Design Districts
ii. [S] Develop street cross sections for Compact Design Districts
iii. [C] Develop recommendations for mix of residential-to-non-residential mix for TOD districts
iv. [B] Conduct "developer testing" of new proposed regulations, including visiting developers from outside the region

IV. Defining / Expanding Infrastructure Networks in Station Areas

a. Chapel Hill

i. [C] Street Network Analysis and Planning
ii. [C] Bike/Ped Analysis and Planning
iii. [C] Sewer/Water Infrastructure Planning
iv. [C] Parking Planning

v. [C] Create District Plans for Stormwater, Public Space, other infrastructure

b. Durham
   i. [C] Create cost estimates for urban station Station Area Strategic Infrastructure (SASI) Projects
   ii. [C] SASI Phase 2: Identify SASI projects for suburban stations
      1. Street Network Analysis and Planning
      2. Bike/Ped Analysis and Planning
      3. Sewer/Water Infrastructure Planning
      4. Parking Planning
      5. Create District Plans for Stormwater, Public Space, other infrastructure

c. Regional
   i. [C] Produce appropriate municipal regulation code requiring side-along multi-use path for bike/ped users in non-NCDOT and non-NCRR rights-of-way adjacent to the DOLRT corridor.

V. Affordable Housing Strategies

a. Regional
   i. [C] Review previous recommendations for Durham & Chapel Hill, and check for compatibility with market analysis
   ii. [C] Provide assessment of the concept of a regional TOD housing fund, incorporating the results of the market assessment
   iii. [B] Engage local developers on affordable housing incentives and filling equity gaps
   iv. [B] Developer Engagement on affordable housing incentives/ ULI Triangle Collaboration
   v. [S] Re-invigorate local practitioners groups (e.g. housing providers, financial expertise, LUCID)
   vi. [S] Research and analysis, including market/demographic trends and opportunity sites; options for 4% and 9% LIHTC, etc.
   vii. [S] Regional TOD fund options
      1. Revenue sources and leveraging opportunities
      2. Governance structures
   viii. [S] Tracking “legally binding” units and public/institutional land, along with market rate affordable housing

b. Chapel Hill
   i. [S] Define Affordable Housing Goals for station areas
   ii. [C] Create strategies to incentivize housing rental and ownership opportunities for a variety of income ranges

c. Durham

VI. Transit Agency TOD Activities

a. [S] Produce a station typology classification for DOLRT that can be applied to the region

b. [B] Produce a station area sketchbook for line-wide consumption, so that people can see different goals among station areas (see Sunrail example)
c. [C] Produce a Joint Development Policy for the Agency
    i. Recommend strategies for surface lots
    ii. Recommend parking replacement methodology
d. [B] Produce a parking replacement policy for DOLRT in relationship to TOD opportunity to gain support with FTA; goal is to have transition process from GoTriangle-owned surface parking to vertical mixed use with structured parking over time.

VII. Ongoing Collaboration & Performance Tracking
a. [B] Indicators
    i. Establish baseline indicators to compare progress to in the future.
    ii. Use FTA, NCDOT SPOT, MPO MTP metrics and local criteria
b. [S] Methods and schedule for collecting, analyzing and reporting indicators
c. [S] On-going collaboration: creating organizational structure for continued commitment and perpetual performance tracking
    i. Roles and timing for interested groups
        1. ULI-Triangle
        2. LUCID
        3. D&I Partners
        4. Specific Practitioner Groups (e.g. housing)
d. [C] Consequence and Outcome modeling to assess impact of decisions on land use to ridership goals, tax base and transit productivity/usage.
    i. If we do…
    ii. If we don't…
    iii. Then we have these outcomes and consequences