



Smart Mobility FRAMEWORK

A Stakeholder Workshop

June 16, 2009

Meeting Summary – Handbook Contributor's Track

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I. Introduction

On June 16, 2009, Caltrans hosted a stakeholder workshop focusing on the Smart Mobility Framework. More than 125 people attended the workshop and participated in breakout sessions in the afternoon that were organized along two tracks, the Handbook Contributor's Track and the Tools and Techniques Track.

Caltrans requested assistance from MIG to ensure that the sessions on the Handbook Contributor's Track were interactive and provided opportunities for good discussion and feedback. The Handbook Contributor's Track featured two sessions, one focusing on the place type definitions and transitions as described in Chapter 3 of the Draft Handbook, and the other focusing on the performance measures described in Chapter 4 of the Handbook. Both sessions included an opening presentation on the material to be discussed and time for questions and clarification, followed by small breakout group discussions. The sessions closed with small group report backs and final remarks by the presenters.

II. Focus on Place Types

Ellen Greenberg opened Session One with a detailed review of Chapter 3 of the Smart Mobility Handbook, focusing on describing the Handbook's material on place types and their transition. Her presentation was structured to allow facilitated discussion on individual topics after they were presented. The individual place types presented included:

- Urban Centers
- Close-In Compact Communities
- Compact Communities
- Suburban
- Rural and Agricultural Lands
- Protected Lands
- Single Use Areas

The group was asked to comment on the overall concept of "place types." The following questions were used to prompt the group discussion:

- Does the concept make sense? Is it clear and useful?
- Do we have the place types right?

- Are there any significant omissions – place types of statewide importance that are not covered?
- Is the statement of how place type transitions relate to investment and management decisions clear and appropriate?
- Are the symbols in the “Smart Mobility Emphasis” column correct?

Following this discussion, the participants were asked to break into small groups, each of which was to focus on one of the place types. It was anticipated that some place types would be of greater interest than others, and that topics may need to be combined. As it turned out, three of the place types – Compact Communities, Rural and Agricultural Lands, and Protected Lands – were not discussed in the breakout groups, while there was sufficient interest in the Suburban place type to warrant two separate breakout groups.

Each group was provided with a facilitator, who worked with the group to walk through the draft section for the specific place type following the section outlines, with the sections starred below receiving the most attention:

- Smart mobility framework
- Relevance of principles
- Planning
- Likely priorities for transportation projects and programs*
- Likely priorities for development and conservation projects and programs*

In making their comments, participants were also asked to consider the following:

- Do you believe the description or characterization is correct?
- Is there anything missing?
- Do you agree with the likely priorities (where relevant)?
- Other priorities?

The following summary points were shared by the group discussing Urban Centers:

- Smart Mobility Framework
 - Urban vs. downtown/CBD
 - Not all include schools
 - Does it include the entire city?

- Relevance of principles
 - Health and safety – placement of schools
 - How is infill addressed? – it’s an opportunity – provide options
 - Urban core – transit excellence
 - Regenerate ridership
 - Equity statement – seems thrown in
 - Second paragraph – needs a transition
 - Paragraph on demographics (p. 32) – need more information – who lives there now? Who gets displaced?
 - Last sentence – “despite high costs”
- Likely priorities for projects (no distinction made between transportation and development/conservation projects)
 - Clarify pedestrian amenities
 - Grocery stores?
 - Tie to urban core/employment and opportunity – mix of services and uses
 - Equity aims and benefits
 - Tie to quality of life

The group dedicated to discussing Close-In Compact Communities made the following summary points:

- Smart Mobility Framework
 - Consider grid network as part of description
 - Include more description of complete community...e.g., services
- Relevance of principles
 - Planning
 - Preserve/enhance employment opportunities
 - Remove barriers to bike and pedestrian mobility
 - Opportunities for scale-appropriate upzoning...intensification
- Likely priorities for transportation projects and programs
 - Priorities within complete streets?
 - HOV systems?
 - Increased transit frequency

- Transportation efficiency
- Consider demographic as well as physical characteristics
- Likely priorities for development and conservation projects and programs
 - Access to parks/open space, community gardens

The first breakout group discussing the Suburban place type did not organize their comments by section, but instead shared the following general summary points:

- Emphasize location/proximity to transit
- Access to resources: soil/water
- “Corridor” emphasis in definition
- Broader range of suburban types
- Separate definitions and actions
 - Regional scale definitions for place types
 - Complete network for all modes
 - Bikes and cars share space

The second Suburban breakout group made the following general summary comments:

- Does this place type need further definition? – different types of suburbs - i.e. other types have clear objectives
- Need for connectivity
- Need to “deconstruct” existing conditions of walls, separations, car-related transportation and reconstruct with accessible routes
- How do we get people to change modes/decrease car use? - i.e. all trips during day (errands after getting to work)
- What is important related to suburban place types?
 - Nothing about large scale transit improvements, i.e. BART
 - Demands in corridor
- Encourage more TOD along transit corridors
 - Parking (adequate) is issue
 - Diversity of destinations from one parking space/transit stop
- More mode shifts mean less people will consider public transportation
- Transit stations can also be “drive-to” and work; not only

- Good list
 - Second bullet – what is short-term “carrot?”
 - Consider additional performance measures
 - Bring in others (not transportation planners, include Public Works)
- Connectivity can be provided by key employers, such as by offering shuttles from transit
- Roadways – need interconnected networks so that entries/key corridors are not impacted at specific times of day
- Suburban areas may have multiple jurisdictions, which impact planning, funding and implementation
- Reducing car trips
 - Look at issues of school buses
 - Availability
 - Funding
 - Who pays?
 - Adequate resources?
- Targeted neighborhood demographics – if you know who is likely to live there, you can provide services
- How do we move this implementation to the local level, and give jurisdictions the tools?
- How do we reduce conflicts and decrease bureaucracy?

Finally, the breakout group discussing Single Use Areas had the following comments to contribute:

- Location efficiency
 - How does it apply?
 - Transition for special use areas?
 - Are they all anchored?
- Place type definition
 - Distinguish between transitional (BRAC) and non-transitional (delete “wilderness;” ports)
- Reliability is often important
- Technology solutions may work

- Guidance for transportation investments
 - Connectivity is often important
 - Ground access is key
- Making freight facilities good neighbor
 - Compatible surrounding land uses

At the conclusion of the breakout group discussions, the larger group reconvened to hear reports from each breakout group. During the large group discussion that followed, the following key points emerged regarding the place types:

Urban Centers

- Just downtown?
- Conflicting goals?
- Equity/demographics
 - Make it livable!
 - Watch displacements!

Close-in, Compact

- Grid system
- Convenient services
- Preserve/enhance employment
- Remove barriers to bike/pedestrians
- Consider upzoning
- Access

Suburban

- Broaden description of suburban
- Access to resources
- Corridor emphasis in definition
 - Increase connectivity and accessibility
- Regional scale of place types
- Inefficiency of land use

- Focus on regional transit hubs
- Demographic characteristics

Rural/Agricultural

- Place types may look different in each region
- Rural = space between urban areas
- Road network connectivity
- No road widening?
 - Be more specific
- Stay away from discussion of taxation...use incentives
- Energy security

Special Uses

- Add universities, educational institutional uses
- Transitional
- Reliability high priority
- High-tech solutions
- Connectivity and ground (other) access
- Preserve land uses around special use areas

III. Smart Mobility Performance Measures

Session Two solicited participant input on the performance measures described in the Smart Mobility Handbook. Jerry Walters provided a broad overview of the performance measures and presented three case studies. He then reviewed the questions to be answered during the small group exercise, which were as follows:

1. Case Study Approach: Are the performance measures presented in the case study examples understandable? Do they seem relevant to the evaluations at hand? From your past experience, can you name other performance measures that might be equally or more useful?

2. Study Consequences: Within the case studies, do the performance measures provide an effective means of determining whether the project alternatives are consistent with Smart Mobility principles (location efficiency, reliability, health and safety, and stewardship)? Please give reasons for your answer.
3. Unintended Consequences: Are there any biases in the set of performance measures that need to be corrected through revision to individual measures or changes to the set of measures?

Participants had already self-selected into discussion groups based upon the seat they chose at one of the six tables set up in the room. They were provided with summary sheets for each of the three case studies and a list of the 20 performance measures from the Handbook to refer to during the discussion. About thirty minutes were allotted for discussion, with a suggestion that the groups should reserve the last two-three minutes to agree on the points reported back to the larger group.

The first breakout group made the following comments:

- “If you measure it, it matters”
- How does it relate to other measurement constructs in place or underway?
- First application is local transportation planners and engineers?
- Different measures for regional vs. project level
- Inadequate data/measures for pedestrian and bike and transit
 - o Expand
- Clarify LOS for auto – modify with word “vehicle”
- Expand on explanation of what minimum LOS means
- Expand “customer satisfaction” to reflect modal experience
- Pedestrian/bike mode share doesn’t reflect connectedness to transit - adequacy
- Transit mode share too simple, e.g., by trip type? Geography?
- Define mode share by arterial category/context /issues, e.g., local vs. through trips
 - o Optimize
- Problem with data collection
- Guidance for project geography?
- Identify target audiences – choice of performance measures
- Balance choices and view unintended consequences (e.g., trucks)

- Where is reliability?
 - Not reflected
- Better reflect social equity – housing, demographics, jobs? Human metrics missing?
- E.g., transportation income share
- Blind to longer trips
 - Through trips
- Weight unclear?
- Unintended consequence
 - Implied weighting
- Consider short-term/long-term consequences by applying measures

The second breakout group reported the following points back to the larger group:

- Safety
 - Measure of exposure
 - Time
 - Population
 - Currently bias towards speed, less exp.
 - Mismatch between traditional functional classification and SM frame
 - Challenge for existing facilities
- Mobility
 - Consistency equals reliability
 - Accessibility equals access to chosen mode
 - Where is equity?
 - Cultural resource reservation?
- Economy
 - Maintenance of investment energy?
 - Financially accessible to user
- Biases
 - Metrics are regulatory-driven. Any way to re-craft?
 - LOS as measure of customer satisfaction
 - People comfortable with what they know

Group 3 made the following comments:

- Need to flesh out multi-modal LOS
- More focus on access rather than mobility
- Need data to support performance measures
- Speed suitability is good improvement
- Productivity: broaden trips beyond commuting
- Emissions: motorized trips reduction
- Safety: maximize safety of all modes
- Mobility: competitive travel types
 - Why choose over driving?
 - Pedestrian/bike mode share
 - Transit mode share
 - Universal accessibility
 - More inclusive
- Economy/customer satisfaction
 - Cost to user
 - Lifecycle cost/maintenance
- Speed suitability can also impact location efficiency

The fourth breakout group replied to the three questions posed as follows:

- Case Study Approach: General work and welcome change to existing system (which are focused on auto travel)
 - Caltrans – improve mobility across California
 - Do these performance measures work?
 - Economy
 - Performance measure – productivity lost to congestion
 - Is this a bad thing?
 - Value judgment
 - Congestion = slower traffic, less cars on road (throughput), time to think
 - Accidents? (more or less with sporadic traffic)
 - Relationship between congestion and pricing

- Safety
 - Take out “accident” – use “incident/collision”
- Mobility
 - Provide for all modes of travel
 - Mobility choices emphasizing bike/pedestrian modes actually are biased against driving
 - In response to “maximizing modes” what does it actually look like?
 - This is not a performance measure, but a goal
 - Determine rates and standards as performance measures, i.e., relate to AB32 standards
- EQ
 - VMT – as related to GHG emissions - there are other elements to evaluate?
- Study Consequences: Effectiveness in evaluating alternatives for smart mobility
 - Need to look at trade offs in many situations
 - Using Case Study 2 – issues with lane narrowing – this could be negative for transit
 - Bus, bikes, pedestrians along with passenger vehicles
 - How do you make it all fit?
 - Multi-modal mobility not well defined in Case Study 2
 - Case studies/evaluation of performance measures need more detail/supporting information – to evaluate the effectiveness
- Unintended consequences of use of performance measures
 - Need to incorporate differences based on varying conditions – i.e., designing roads for highest traffic levels/time of day
 - Biases are inevitable
 - Stipulate that there is a policy bias toward multi-modal design/implementation
 - Case Study 3
 - Instead of assuming that a lane (HOV) needs to be added, also include consideration of increasing effectiveness of existing infrastructure – i.e. keep number of lanes, and change one to HOV
 - Also, in general, we need corridor-wide data to actually evaluate – i.e., LOS/multi-modal LOS

Group 5 reported back with the following comments:

- Equity and health components need to be more prominent
 - Bike/pedestrian can address this
 - Access – to parks, healthy foods
- Customer satisfaction
 - Assumes static conditions
 - For public health – need to promote bike/pedestrian
 - Doesn't recognize other indicators
 - How will they be used?
 - Metrics?
- What is the intention of the performance measures?
 - Model, score, weighting
 - Does this yield a weighted score metric?
 - Too many performance measures! Or are they a menu? Lacks context
- Performance measures can help overcome political favoritism – reduce subjectivity
 - What's the mix or minimum number?
- Outcome should yield a decision-making process
- Matrix that works at local, regional or state level
 - Need implementation plan/drill down
 - Baselines/context
- Case Study #2
 - Criteria need to help discriminate
 - Are "checks" equal?
 - Customer satisfaction – as described it reflects the status quo (needs to be improved) – i.e., currently consumer doesn't have to share the road
 - Do we measure by mode?
 - Housing and social connectivity need to be addressed – under land use efficiency
 - Sample performance measure
 - Percentage of population with minimum walk access to 15 minute transit
 - Access to full-service grocery store and healthy foods
- Case Study #3
 - Easier to apply to CSMP or system wide project

- Performance measure – location efficiency is missing!

Finally, Group 6 made the following points:

- Case study approach
 - ROI nexus – not clear
 - Freight benefits – missing
 - Network management – not clear
 - Current measure of vehicle travel vis-à-vis transit
 - Ignores parking cost
 - Full trip time (including walk to final destination)
- Consequences
 - Example 2 arterial
 - If slow traffic – could divert traffic to alternate routes
 - Problem statement
 - Is congestion a problem?
 - How you frame the problem affects the solution
 - Consider full corridor, not just arterial
 - Example 3 CSMP
 - Lack of data on bike/ped could lead to non-Smart Mobility outcome
 - Lack of data on transit ridership per route (not in performance measures)
 - Would be nice to do detailed case study with full data
 - Productivity – multi-tasking on transit is more productive than driving
 - Consequences of measures depends on data used to develop them (example of mode shift to bike)
 - Difficulty of forecasting bike demand
 - These are great performance measures, but they won't be used without data (example of transit use data – not in Caltrans control)

At the conclusion of the small group discussion period, participants returned to the larger group for report backs and a final discussion. A wallgraphic summary was prepared during the meeting and is attached at the end of this document. The following key points emerged during the final discussion on performance measures:

- Economy: cost to user

- Metrics are regulatory
- More customer satisfaction
- Need to see equity and cultural preservation
- Need weighted scoring system
- Case study #2: Customer satisfaction
- Case study #3: Criteria/weighting
- If you measure it, it matters!
- Unclear:
 - ROI nexus
 - Network management
- Vehicle trip time needs to include cost of parking and door-to-door
- Case study #2: Unintended consequences
- Case study #3: Need more bike/pedestrian/transit data
- Productivity
- Performance measures need data and standards
- Welcome change from conventional measures
- Different measures for regional and project level
- Apply at local level
- What is mission?
- Productivity: how do we measure that?
- Benefits of congestion
- Customer satisfaction needs more fleshing out
- Pedestrian/bike mode share needs to relate to transit connectivity
- Take geography into account
- Need to demonstrate consideration of equity

URBAN CENTERS

PLACE TYPES!!

- ✓ JUST DOWNTOWN?
- ✓ CONFLICTING GOALS?
- ✓ EQUITY/DEMOGRAPHICS
- MAKE IT LIVABLE?
- WATCH DISPLACEMENTS!!

CLOSE-IN COMPACT

- ✓ GRID SYSTEM
- ✓ CONVENIENT SERVICES
- ✓ PRESERVE/ENHANCE EMPLOYMENT
- ✓ REMOVE BARRIERS TO BIKE/PED.
- ✓ CONSIDER UPZONING.
- ✓ ACCESS

SUBURBAN

- ✓ BROKEN DESCRIPTION OF SUBURBAN
- ✓ ACCESS TO RESOURCES
- ✓ CORRIDOR EMPHASIS IN DEFINITION
 - increase connectivity
 - accessibility
- ✓ REGIONAL SCALE OF PLACE TYPES
- ✓ INEFFICIENCY OF LAND USE
- ✓ FOCUS ON REGIONAL TRANSIT HUBS
- ✓ DEMOGRAPHIC CHARACTERISTICS

BURBAN

- ✓ PLACE TYPES MAY LOOK DIFFERENT IN EACH REGION
- ✓ GAP = SPACE BETWEEN URBAN AREAS...
- ✓ ROAD NETWORK CONNECTIVITY
- ✓ NO ROAD WIDENING?
 - be more specific
- ✓ STAY AWAY FROM DISCUSSION OF TAXATION ... USE INCENTIVES
- ✓ ENERGY SECURITY

SPECIAL USES

- ✓ ADD UNIVERSITIES ED INSTITUTIONAL USES
- ✓ TRANSITIONAL
- ✓ RELIABILITY HIGH PRIORITY
- ✓ HIGH TECH SOLUTIONS!!
- ✓ CONNECTIVITY!!
 - * GROUND (or) ACCESS
- ✓ PRESERVE LAND USES AROUND SPECIAL USE AREAS

PERFORMANCE MEASURES!!

- ECONOMY: COST TO USER
- METRICS ARE REGULATORY
- MORE CUSTOMER SATISFACTION
- NEED TO SEE EQUITY + CULTURAL PRESERVATION
- NEED WEIGHTED SCORING SYSTEM
- CASE STUDY #2: CUSTOMER SATISFACTION
- CASE STUDY #3: CRITERIA/WEIGHTING

IF YOU MEASURE IT, IT MATTERS!!

- POI NEXUS NETWORK MGT] UNCLER
- VEHICLE TRIP TIME NEEDS TO INCLUDE # OF PARKING → DOOR-TO-DOOR
- CASE STUDY #2: UNINTENDED CONSEQUENCE
- CASE STUDY #3: NEED MORE BIKE/PED/TRANSIT DATA...
- PRODUCTIVITY
- PMs NEED DATA: STANDARDS
- WELCOME CHANGE FROM CONV'L MEASURES

- DIFFERENT MEASURES FOR REGIONAL + PROJECT LEVEL
- APPM AT LOCAL LEVEL
- WHAT IS METRIC?
- PRODUCTIVITY: HOW DO WE MEASURE THAT
- BENEFITS OF CONGESTION
- CUSTOMER SATISFACTION NEEDS MORE FLESHING OUT
- PED/BIKE MODE SHARE NEEDS TO RELATE TO TRANSIT CONNECTIVITY
- TAKE GEOGRAPHY INTO ACCOUNT
- NEED TO DEMONSTRATE CONSISTENCY OF EQUITY

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