



Transportation Demand Management Handbook



Version 2.0

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1 Carlsbad TDM Overview

1.1 Introduction

As Carlsbad becomes an increasingly desirable place for people to live, work, and play, it is important that the city balances growth and economic opportunity with demand on roadway and parking infrastructure and a responsibility to achieve environmental targets. At the same time, innovation across the mobility landscape is accelerating at a rapid pace, adding new and emerging approaches and technologies, such as microtransit, shared mobility, remote work, and advances in autonomous vehicles.

In September 2015, the City of Carlsbad adopted a **Climate Action Plan (CAP)** to promote sustainability in the community and help meet greenhouse gas (GHG) reduction targets. As automobile emissions contribute significantly to GHG emissions, the CAP directed the city to adopt a citywide **Transportation Demand Management (TDM) plan** (Measure K-1) and **TDM ordinance** (Measure K-2) to encourage Carlsbad workers to shift from driving alone to traveling by sustainable modes. TDM policies and programs encourage people to drive less and walk, bike, ride transit or carpool more.

The **citywide TDM plan** describes the city's strategic approach to implementing TDM to meet the requirements of Measure K-1 and K-2 and City Council Policies. The plan identifies four strategic areas: infrastructure, regulations & policies, guiding resources and the larger TDM program.

The City of Carlsbad's TDM Program was designed to implement the citywide TDM plan. The program supports and implements policies set out in several important city planning and policy documents and reinforces state and regional plans and programs, such as SANDAG's **iCommute program**, that promote equitable and sustainable development and increased mobility options for all residents, workers, and visitors. Appendix B includes more detail on how the TDM program aligns with local, regional, and state programs and plans.

The TDM program is measured by the percentage of trips made by alternative transportation modes rather than by driving alone. The mode share goals for the TDM ordinance and the TDM business outreach program are tied to the City of Carlsbad's alternative mode share goal identified in the 2015 CAP and will be adjusted should there be a change in future editions of the CAP. The 2015 CAP set an overall alternative mode share goal of 32 percent by 2035: 30% for existing non-residential buildings and 40% for new non-residential buildings.

Generally, these different TDM requirements for the City of Carlsbad involve implementing infrastructure and non-infrastructure TDM strategies through a project-level TDM Plan registered with the Carlsbad Transportation Administrator and conducting regular surveys of

employees to ensure compliance. The TDM Plan, specifies the conditions – be it new development or redevelopment, residential or non-residential – and the actions that must be taken. This handbook also describes required TDM strategies which *must* be included in a project-level TDM Plan and optional TDM strategies which *may* be included in a TDM plan. City of Carlsbad staff through the Carlsbad Commuter program are available to help implement business and residential TDM Plans.

Are you developing a new residential or commercial development? Are you a transportation coordinator that just got handed your organization’s TDM Plan? This TDM Handbook is a resource designed to help you navigate TDM plan requirements as well as provide general resources for the implementation of TDM strategies, thereby supporting the city’s commitment to conservation and sustainability. The purpose of this handbook is to provide an overview of what TDM is and its importance to Carlsbad, establish rules and procedures for the administration of the TDM ordinance and mobility element policies, and to make it easy for Carlsbad businesses to comply with these requirements. The TDM Handbook will be updated by city staff as needed, to meet the goals and objectives of the CAP and other city initiatives.

TDM Ordinance and Plan Requirement

The TDM ordinance (Measure K-2) was approved in the spring of 2019 and became effective on April 11, 2019. The general purpose of the TDM ordinance is to establish regulatory TDM requirements for new non-residential developments and redevelopments in the City of Carlsbad. The TDM ordinance requires non-residential developments that generate 110 or more average daily employee trips (ADET) to prepare a TDM plan. If a project triggers both the TDM ordinance and the General Plan Mobility Element TDM plan requirement, a TDM plan shall be prepared in accordance with the requirements of the TDM ordinance. This handbook is incorporated by reference into the TDM ordinance and elements of the handbook are enforceable.

General Plan Mobility Element TDM Plan Requirement

Residential and non-residential new developments that do not fall under the TDM ordinance may be required to prepare and implement a TDM plan if the development adds vehicle traffic to street facilities that are exempt from the vehicle LOS standard, consistent with 3-P.11 of the General Plan Mobility Element. If a project triggers both the TDM ordinance and the General Plan Mobility Element TDM plan requirement, a TDM plan shall be prepared in accordance with the requirements of the TDM ordinance.

TDM Business Outreach Program

The TDM Business Outreach Program provides support to implement TDM, meet the goals of the Climate Action Plan, and ultimately works together with planned infrastructure improvements to reduce single-occupancy vehicle trips.

The program, called Carlsbad Commuter, is provided by the city as a service to support developers, property managers, and employers. It provides outreach and support to local employers to help improve transportation options for their workers. The program also provides assistance to developers with the implementation of site-specific plans required by the TDM ordinance.

Along with local and regional transportation initiatives, the TDM Business Outreach Program helps establish a new way of thinking about mobility in Carlsbad worthy of a world class city.

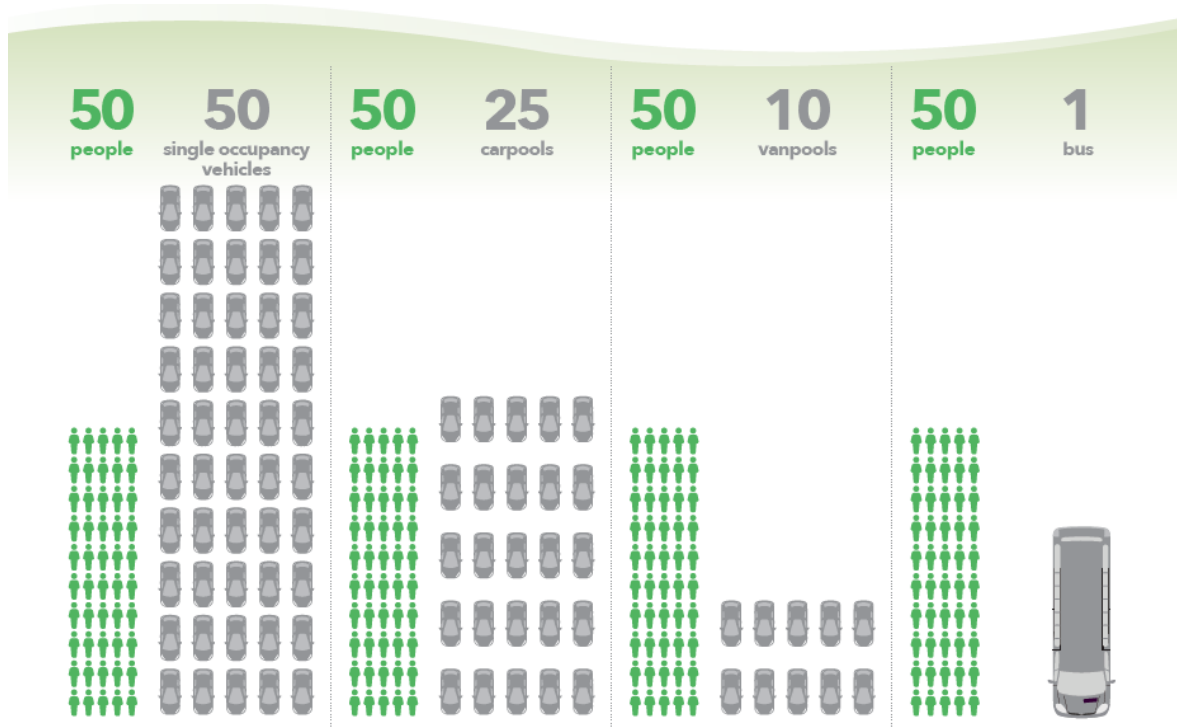
TDM Residential Outreach

The citywide TDM program also includes outreach to residents via schools and common interest developments, such as homeowner associations.

1.2 What is TDM?

Transportation Demand Management (TDM) is the concept of using policies, strategies, and programmatic measures to encourage a shift away from single-occupancy vehicle (SOV) trips toward alternative travel options, such as walking, biking, transit, and ridesharing to reduce demand for congested roadways and parking. In other words, TDM efforts try to get people to drive alone less, and instead, walk, bike, ride transit or carpool more. TDM is generally not about building new roads or bike lanes or operating travel services. It's about using subsidies, policies, and education to make the transportation system that we have work better. Less time spent in a car can benefit the individual in many ways by reducing stress, increasing physical activity, and saving money. Cumulatively, it also can allow for a much more efficient use of road space, thereby increasing mobility, decreasing vehicle miles traveled (VMT), and decreasing greenhouse gas (GHG) emissions.

Figure 1-1 TDM Concept



Effective TDM is Multi-Faceted and Comprehensive

A robust TDM program incorporates a variety of interventions to promote sustainable choices during the transportation decision-making process. TDM interventions could include onsite TDM-supportive amenities and facilities that increase the mobility options available to individuals, marketing and incentive programs that encourage other travel options, disincentives to make driving less attractive, and travel planning assistance to empower commuters to make informed decisions. Different types of TDM interventions reinforce one another to create a comprehensive program that supports a range of transportation modes.

1.3 Types of TDM Strategies

TDM strategies can be implemented at the site, district, city, or regional level. This handbook focuses on strategies that are implemented at the site level by businesses or residential properties. Strategies typically fall into two categories:

- Site-specific infrastructure strategies support alternative travel to and from the site. They include bike parking, showers and lockers for individuals biking or walking to work, preferential carpool and vanpool parking, bike and pedestrian connections across a site or to the citywide bike and pedestrian network, and onsite amenities that reduce employee or resident trips, such as fitness centers, coffee shops, restaurants/cafeterias, ATMs, or similar services.
- Non-infrastructure strategies incentivize alternative travel by employees and residents. They include alternative transportation subsidies, ridematching services to facilitate

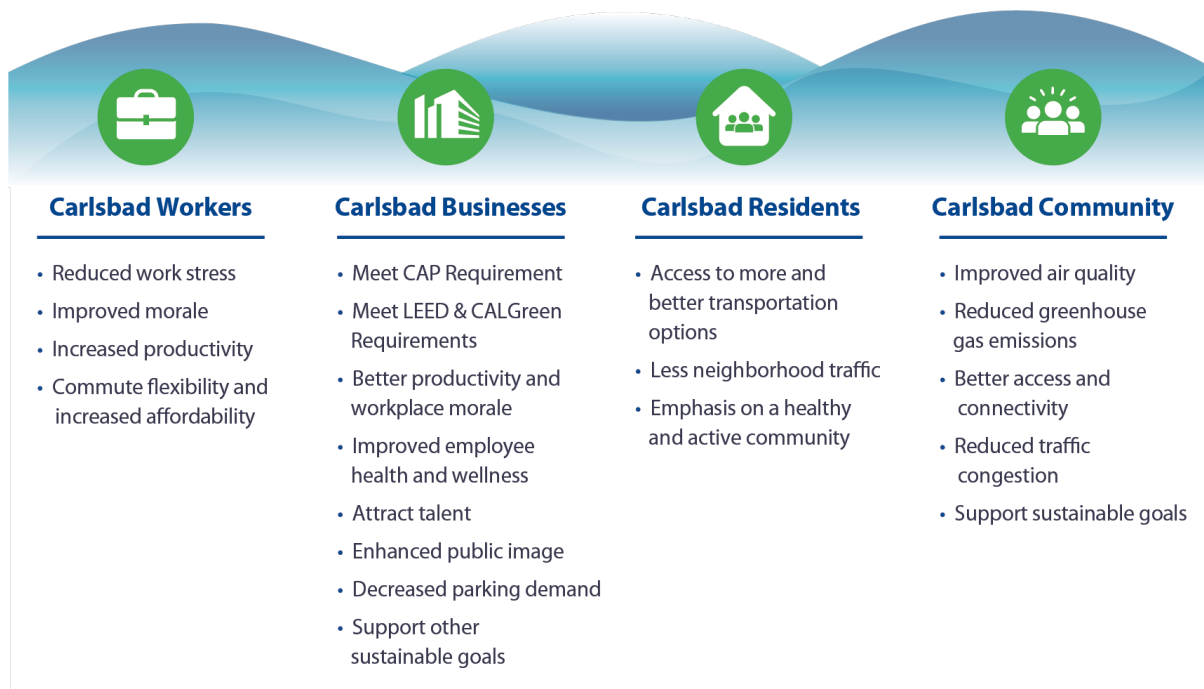
carpooling, guaranteed ride home programs, and marketing and outreach events and programs.

A comprehensive list of strategies eligible for mandated TDM plans is available in Appendix A.

1.4 Benefits of TDM

The TDM Program helps the city achieve its sustainability and mobility goals by managing growth and development, mitigating congestion, improving air quality, and increasing access and connectivity in the transportation network. TDM practices also have many short-term and long-term benefits for Carlsbad workers, businesses, residents, and the community.

Figure 2-1 Benefits of TDM



For examples of the benefits of implementing a TDM Plan, please refer to [Section 4.4 Case Studies](#).

1.5 Who should implement TDM Strategies?

TDM strategies can be implemented by and tailored to employers of all sizes, schools, and residential properties. Many strategies are low-cost interventions and can be implemented without large upfront investments.

This handbook provides information and resources to all developers, property managers, homeowners associations, schools, and employers doing business in the City of Carlsbad. Whether you are required to prepare and implement a TDM plan or are interested in improving

commute options for employees, guidance and resources for all scenarios are covered in this document.

- Refer to **Section 2 Carlsbad TDM Ordinance** for information about who the ordinance applies to and step-by-step guidance for compliance.
- Refer to **Section 3 General Plan Mobility Element TDM Plan Requirement** for information about developments required to prepare a TDM plan under the General Plan Mobility Element.
- Refer to **Section 4 TDM Business Outreach Program** for information about the TDM program available for all employers and property managers located within the City of Carlsbad.

2 Carlsbad TDM Ordinance

2.1 Background

The TDM ordinance was approved in the spring of 2019 and became effective on April 11, 2019. The general purpose of the TDM ordinance is to establish regulatory development requirements for TDM in the City of Carlsbad. The TDM ordinance places requirements on non-residential development that is anticipated to generate 110 or more average daily employee trips (ADET).

The 110-employee trip threshold was chosen to align with the Governor’s Office of Planning & Research’s Technical Advisory document on evaluating transportation impacts in CEQA. The focus on employee trips only acknowledges that employers can significantly influence how employees travel with TDM strategies while having far less ability to influence how customers and visitors travel. That document, released in December 2018, identified that projects generating fewer than 110 average daily trips could generally be assumed to cause a less than significant transportation impact.

2.2 Purpose of the Ordinance

The City of Carlsbad’s TDM Ordinance is designed to ensure developers, property managers, and employers provide sufficient on-site amenities and services for walking, biking, ridesharing, and transit to reduce single-occupancy vehicle (SOV) trips among Carlsbad workers as required by Measure K-2 of the Climate Action Plan Measure (CAP).

The city’s primary goal for the TDM Ordinance is to increase alternative (non-SOV) mode share to 40% for new developments and 30% for existing developments by 2035.

As a reflection of the city’s commitment to the Carlsbad Community Vision for the future, the ordinance is consistent with the General Plan, Climate Action Plan (CAP), and other supporting policies. In addition, the TDM ordinance aligns with many other policy goals to improve quality of life for Carlsbad residents and workers. The TDM ordinance has six supporting objectives:

- Manage growth and development.
- Increase access to transportation options and mobility.
- Foster a healthy community for Carlsbad residents and workers.
- Build inter-agency partnerships and strengthen regional sustainability and mobility efforts.
- Focus on local sub-areas for improvements to align with the Sustainable Mobility Plan.
- Promote emerging mobility technologies.

The City of Carlsbad has hired a Transportation Administrator (Carlsbad TA) to assist developers with TDM Ordinance compliance and completion of a plan. Accompanying this document is a TDM Plan Template to further assist developers in development of the TDM plan.

2.3 Relationship of the Ordinance to Other TDM Mitigation Measures

Carlsbad's Multimodal Level of Service (MMLoS) mitigation measures and California Environmental Quality Act (CEQA) mitigation measures may result in implementation of TDM measures. These present separate pathways to TDM implementation aiming to achieve different goals than the TDM ordinance. However, some measures may be eligible to count towards the total number of points required in the TDM plan, provided they adhere to the requirements of the TDM measure as detailed in this handbook. Regardless of the source of the TDM measure requirement, all TDM strategies associated with a specific project are contained in a single TDM plan to be implemented and monitored in accordance with the details contained in the TDM plan. TDM measures will be reviewed and approved according to the requirements of the specific pathway the measure is proposed to satisfy. TDM measures used to meet CEQA requirements must remain in perpetuity with the project.

2.4 Thresholds for Compliance

Proposed non-residential development projects with trip generation estimates of 110 average daily employee trips (ADET) or more are subject to the transportation demand management (TDM) ordinance and are required to complete and implement a TDM Plan. A development is any construction, re-construction, re-model, or alteration of the size of any building structure, or area of occupancy, requiring a development permit; any grading activities requiring a development permit; change in the density or intensity of use of land requiring a development permit. Renovation work, such as window replacement, electrical upgrades, lighting, painting, etc. is not considered development. Examples of development are:

- New building construction
- Building additions
- Tenant improvements to existing building space
- A redevelopment creating a single space/suite hosting one business that creates 110 employee trips.
- Creation of outdoor facilities where employees are expected to work, such as outdoor dining areas, amusement parks, outdoor retail, etc.

The square footage used to calculate the trip generation estimate for tenant improvements is based on the floor area of the improvement, not the square footage of the entire building. No credit for daily employee trips is given for existing uses that are replaced by a proposed project. Similarly, some infrastructure improvements are sized based on the square footage of the improvement. However, the TDM plan is applicable to all the applicant's employees located at the site. While requirements for infrastructure improvements are correlated to the size of the tenant improvement, programmatic measures are expected to be available to all employees at the site.

2.4.1 Tiered Requirements

TDM requirements for new developments vary by the expected average daily employee trips (ADET). All developments that meet the threshold of 110 ADET are required to submit a

TDM plan using the TDM Plan Template for Ordinance Projects and are subject to the monitoring and reporting schedule described in section 2.8.

Table 2-1 TDM Plan Applicability

ADET	New Development/ Tenant Improvement
<110	Exempt
110 - 220	Tier 1
221 - 275	Tier 2
>275	Tier 3

Average daily employee trips will be calculated using the ADET estimations in Table 2-2. Uses not listed may be subject to special consideration should contact city staff for further information. For projects with multiple uses, calculate ADET based on the square footage for each use.

Table 2-2 ADET Estimation for Various Commercial Uses

Use	ADET for first 1,000 sq. ft.	ADET/ 1000 sq. ft. thereafter ¹
Office- all uses ²	13.0	13.0
Restaurant	11.0	11.0
Retail ³	8.0	4.5
Industrial	4.0	3.5
Manufacturing	4.0	3.0
Warehousing	4.0	1.0

Example 1: a 23,000 sq. ft. retail development would be estimated to generate 107 trips: 8 trips for the first 1,000 sq. ft. and 99 for the next 22,000 sq. ft. ($23,000/1,000 * 4.5$).

Example 2: a 100,000 sq. ft. warehouse with 5,000 sq. ft. of office would be estimated to generate a total of 168 ADET: 65 trips for the office use ($5,000/1,000 * 13$) plus 4 trips for the first 1,000 sq. ft. of warehousing plus 99 trips for the remaining 99,000 sq. ft. of warehousing ($99,000/1,000 * 1$).

¹ Unless otherwise noted, rates estimated from ITE Trip Generation Manual, 10th Edition

² For all office categories. Calibrated based on typical number of employees/square foot for office uses.

³ Retail uses include shopping center, variety store, supermarket, gyms, pharmacy, etc.

2.5 TDM Plan Requirements

The following TDM plan elements are required. They are further described in the TDM Plan Template (Appendix C). Some projects may be identified as unique by city staff and may be subject to a case-by-case analysis of TDM plan requirements.

- Existing conditions and context
- Agreement to implement the following required strategies:
 - Designating a transportation coordinator (TC). The TC must attend an introductory TC meeting and completing a TC training.
 - Distributing transportation options information to new employees.
 - Coordinating with the city’s business outreach TDM program (Carlsbad Commuter), including attending at least one event or meeting and participating in/promoting at least two citywide TDM events per year.
 - **Shell buildings and multi-tenant buildings only:** Requiring TDM participation by tenants via lease language. At a minimum, tenant must agree to provide a current contact, participate in promoting the project’s TDM strategies and sustainable transportation, and distribute and promote surveys to their employees to comply with monitoring. The building owner remains responsible for TDM plan compliance and must provide a transportation coordinator. *Note: Tenants applying for a building permit have the option to choose the property’s TDM plan or create their own. If they choose their property’s TDM plan, they must complete the TDM Plan Acknowledgment Form in Appendix G before the building permit is issued. If they trigger a higher tier level, they must create their own TDM plan for city approval.*
- A selection of infrastructure improvements and non-infrastructure strategies must be chosen to supplement the required strategies and achieve the number of points detailed in Table 2-3. The number of points available for different strategies roughly correspond to each strategy’s trip reduction potential.

Table 2-3: Required Points by Tier

	Required Points**	Elective Points	Total Points
Tier 1	4	2	6
Tier 2	4	5	9
Tier 3	4	14*	18

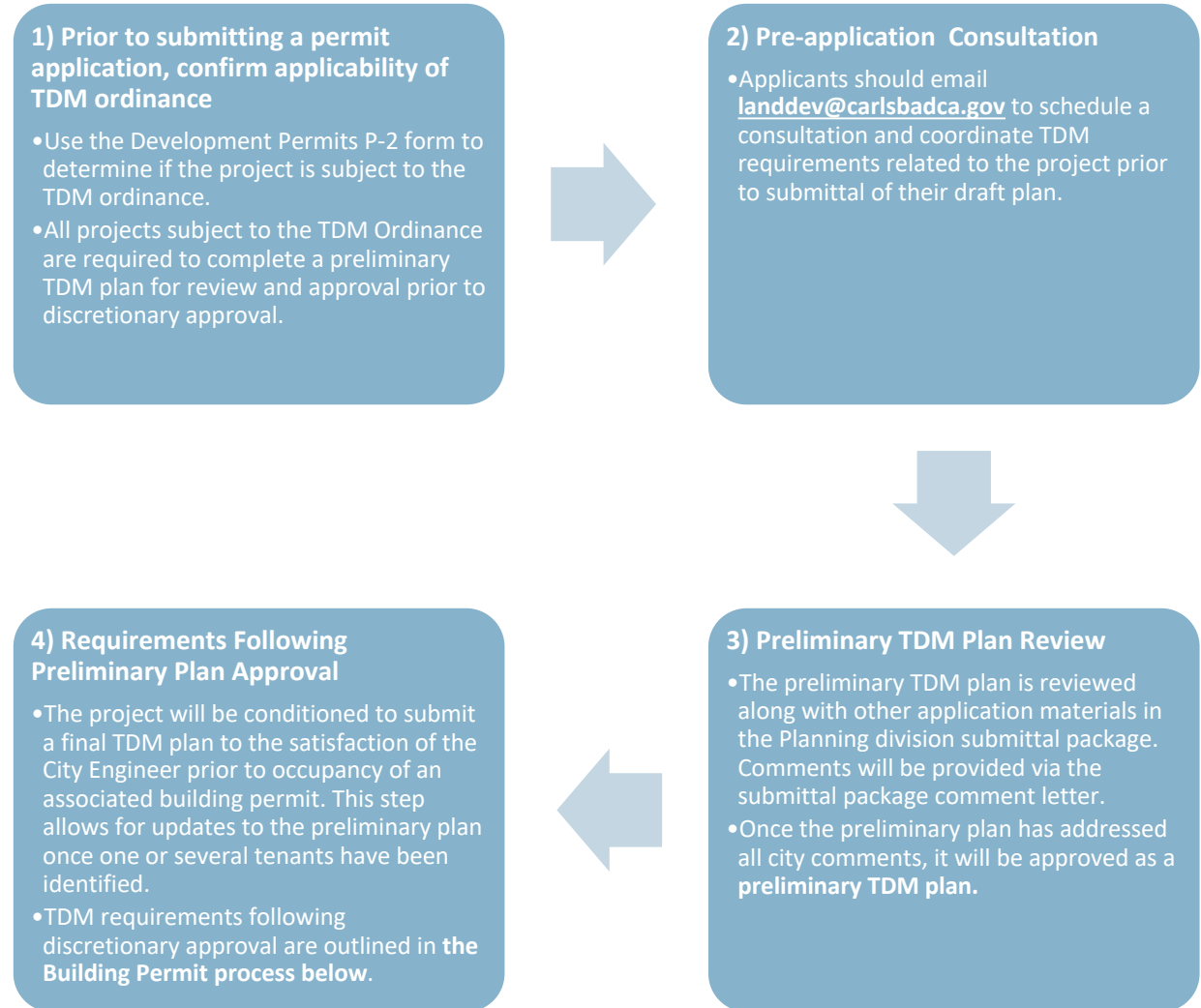
*Tier 3 projects must gain at least six points through infrastructure strategies and Tier 1 and 2 projects must select from both infrastructure and non-infrastructure strategies, unless otherwise approved by the City of Carlsbad.

**Shell buildings and multi-tenant buildings have five required points since they must include TDM in their lease language.

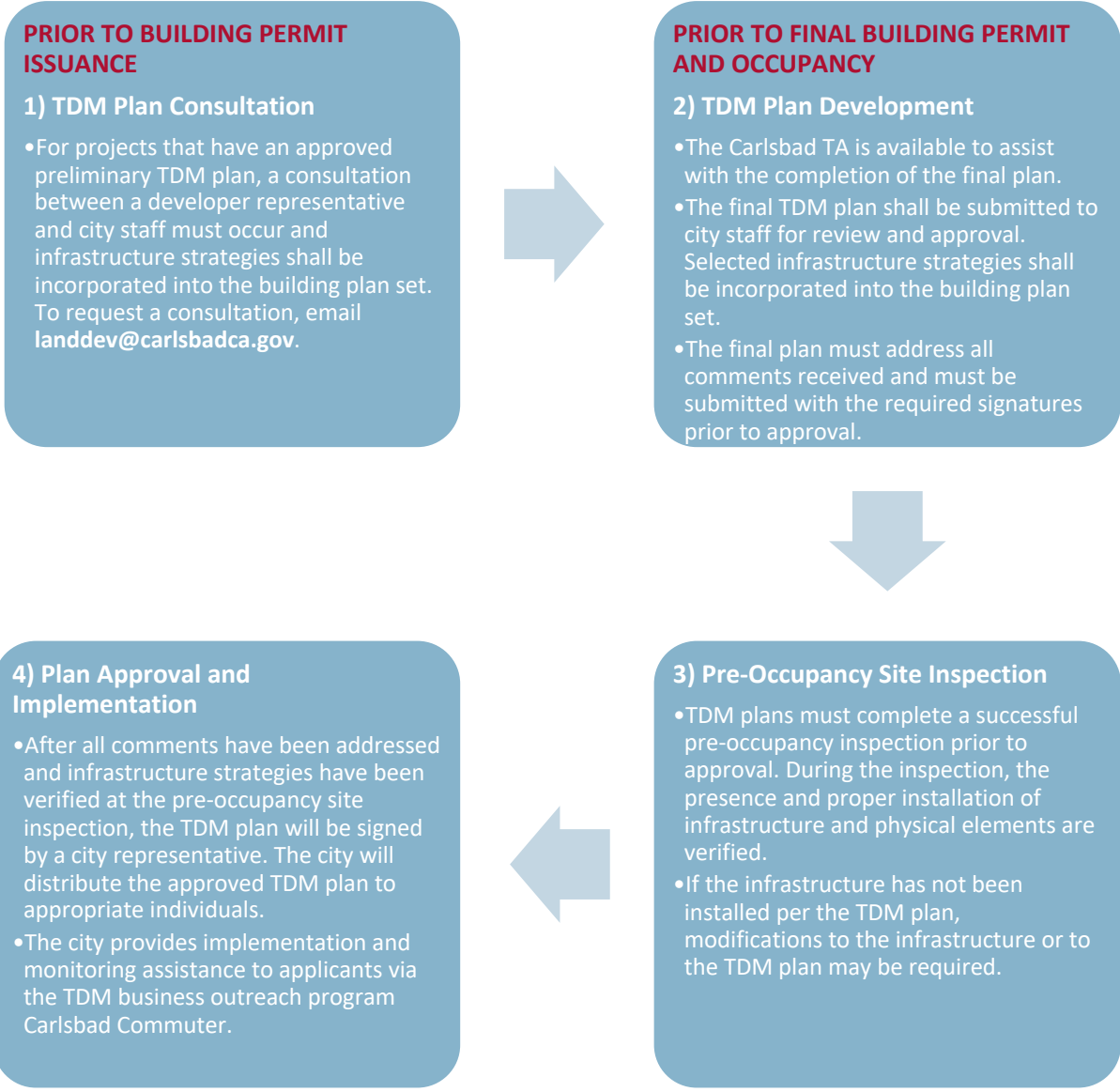
- Agreement to adhere to monitoring and reporting requirements as described in Section 2.8.
- The strategies selected may be changed in the future by amending the TDM plan according to the process laid out in Section 2.8.

2.6 TDM Plan Review and Approval Process

Discretionary Permits (if applicable)



Building Permits – Projects with a Preliminary Plan on File



Building Permits – Projects with no Preliminary Plan on File

PRIOR TO BUILDING PERMIT ISSUANCE

1) TDM Plan Consultation

- Prior to issuance of a building permit, all projects subject to the TDM ordinance must complete a consultation with city staff regarding submittal of the TDM plan. To request a consultation, email landdev@carlsbadca.gov.
- In addition, a consultation between the plan preparer and city staff or the Carlsbad TA must occur prior to building permit issuance.
- If the property has an approved TDM plan on file, applicants may choose to sign on to the property's plan, unless a higher tier is required.



2) Infrastructure Selection

- Applicants who develop their own plan must identify infrastructure strategies before building permit issuance and discuss and email them with an early draft plan to the Carlsbad TA for preliminary approval. These infrastructure strategies will need to be incorporated into the building plan set.



PRIOR TO FINAL BUILDING PERMIT AND OCCUPANCY

3) TDM Plan Development

- The Carlsbad TA is available to assist with the completion of the plan.
- Applicants/plan preparers submit a draft of the final plan using the template in Appendix C with supporting documentation to the Carlsbad TA for review and receives feedback at the latest six weeks before occupancy is expected.
- The final plan must address all comments received and must be submitted with the required signatures prior to approval.



4) Pre-Occupancy Site Inspection

- TDM plans must complete a successful pre-occupancy inspection prior to approval. During the inspection, the presence and proper installation of infrastructure and physical elements are verified.
- If the infrastructure has not been installed per the TDM plan, modifications to the infrastructure or to the TDM plan may be required.



5) Plan Approval and Implementation

- After all comments have been addressed and infrastructure strategies have been verified at the pre-occupancy site inspection, the TDM plan will be signed by a city representative. The city will distribute the approved TDM plan to appropriate individuals.
- The city provides implementation and monitoring assistance to applicants via the TDM business outreach program Carlsbad Commuter.

2.7 Strategy Selection

All TDM plans require the selection of strategies in addition to the required ones. This section describes the required strategies and includes a menu of infrastructure and non-infrastructure strategies available to fulfill the plan requirements. Reference Appendix A for detailed guidance and standards for each strategy. All projects must select strategies from both menus and Tier 3 plans must achieve a minimum of six points through infrastructure strategies, unless otherwise approved by city staff.

Some strategies contain a range of points. The applicant will work with the TA to determine the likely effectiveness of the strategy based on the unique attributes of the site and proposed development. In general, the point value is relative to the level of effort and the applicability of a strategy based on the development context.

The menu of strategies will be reviewed periodically by city staff to adjust point values of TDM measures as necessary or to add new measures. The revised menu of TDM strategies will only be used for new application, however, a property owner may file a TDM plan update application containing revised strategies at any time for review and approval by the city.

2.7.1 Required Strategies

As laid out in Table 2-4 below, required strategies yield 4 points towards the required number of points.

Table 2-4 Menu of TDM Strategies: Required Strategies

Category	Name	Description	Points
Required	Designated Transportation Coordinator (TC)	Designate an on-site Transportation Coordinator responsible for ensuring compliance with City of Carlsbad TDM Plan requirements.	1
	New Hire Transportation Information	Distribute transportation options information provided by the citywide program to new hires at the point of hiring.	1
	Citywide TDM Program	Active participation in the citywide TDM program.	2
Required for Shell and Multi-Tenant Buildings	TDM in Leases and Purchase Agreements	Establish requirements in leases and unit purchase agreements that bind tenants to provide TDM services.	1

Designated Transportation Coordinator (TC)

All developments are *required* to designate a transportation coordinator responsible for ensuring that infrastructure is maintained, policies and programs are implemented, and amenities and partnerships are maintained as described in the approved TDM Plan. The designated TC should be on-site, unless otherwise approved by the City of Carlsbad. The TC ensures compliance with City of Carlsbad TDM Plan requirements and must attend an introductory meeting and complete a TC training.

This requirement is active for the life of the TDM plan and must be in place prior to occupancy. If a property changes hands, a new property manager is hired, or staff turns over, a new TC must be designated using the TC designation form in Appendix F.

Plan Guidance: Complete the TC Designation Form.

Distribute New Hire Transportation Information

All developments subject to the TDM ordinance are required to ensure that transportation options information is distributed to new employees during the hiring and orientation process.

Citywide TDM Program

All developments subject to the TDM ordinance are required to meet with the citywide TDM programs outreach staff on a regular basis (at least annually) and participate in/promote at least two events held by the citywide TDM program.

TDM In Leases (New Shell Buildings and Multi-Tenant Buildings Only)

Establish requirements in lease agreements that require tenants to implement and promote the strategies detailed in the approved TDM plan and comply with the monitoring requirements, such as distributing an employee commute survey and achieving required response rates. Lease agreements must include a copy of the TDM plan and specify which TDM plan commitments must be implemented by the tenant. Note that tenants applying for a building permit have the option to choose the property's TDM plan or create their own. If they trigger a higher tier level, they must create their own TDM plan for city approval.

Plan Guidance: Provide language that will be included in the lease that details the requirements above, describes for which strategies the tenant(s) will be responsible, and note that lease agreements will be accompanied by the approved TDM plan. Tenant TC contacts must be provided prior to the pre-occupancy inspection.

2.7.2 Infrastructure TDM Selections

In the case of a tenant improvement, if the tenant has access to any infrastructure amenities listed in Table 2-5, the tenant can claim that amenity in their plan unless that amenity does not meet minimum standards or is, on average, fully utilized, such as two carpool spaces that are both occupied on most weekdays. The capacity of an existing infrastructure amenity will need to be evaluated at the time the strategy is proposed.

A formal site visit (pre-occupancy inspection) will be scheduled to confirm that infrastructure improvements have been completed and located as agreed upon in the TDM Plan prior to occupancy.

The following table provides high level descriptions of the strategies and the point value. **Please refer to Appendix A for a detailed description of each strategy, applicability, minimum standards, and plan guidance. Points will be awarded based on whether the measure meets the standards and guidance laid out in Appendix A.**

Table 2-5 Menu of TDM Strategies: Infrastructure Strategies*

Category	Name	Description	Points
Infrastructure	Secure Bike Parking	Provide a secure, weather-protected bike cage or bike room for employees.	1
	Public Bike Racks	Provide public bike racks near the building entrances for all cyclists, including retail customers and visitors.	1
	Bicycle Repair Station	Provide on-site tools and space for bicycle repair. Bike repair stations shall include repair stands, air pumps, and other tools and resources necessary to quickly repair a bike.	1
	Micromobility Parking	Provide parking and charging for micromobility devices, e.g., dockless bike share, e-bikes, e-scooters, and docked bike share.	1
	Preferential Parking for Car/Vanpools	Provide preferential parking for car and vanpool vehicles that is close to the building entrance, covered, or otherwise preferable.	1-2
	Car Share Parking and Vehicles	Provide one or several car share vehicles along with preferential parking that is close to the building entrance, covered, or otherwise preferable.	1-2
	End of Trip Facilities	Provide showers, lockers, and changing rooms for employees who use active transportation to get to work.	1
	On-site Amenities	Provide access to on-site amenities such as on-site childcare, restaurants and shops, wellness centers, and other employee convenience services that reduce the need to drive for errands during the workday.	1-2
	Bicycle and Pedestrian Connections	Improve pedestrian and bicycle connectivity onsite/adjacent to the site consistent with the city's Sustainable Mobility Plan and related bicycle and pedestrian planning efforts. Provide direct routes from public sidewalks to each building in the project.	1
	Passenger Loading Zone	Provide signed passenger loading curb space for shuttle, microtransit, ride-hailing or carpooling pick-up/drop off.	1
	Innovation	Any other physical site-improvement at the worksite to reduce single-occupancy vehicles will be considered.	1-5

*If a strategy is contingent upon a partnership with a third party for implementation and the company becomes defunct, the product becomes obsolete or otherwise unusable, the applicant should work with the TA to identify a suitable alternative.

2.7.3 Non-Infrastructure TDM Selections

The strategies in Table 2-6 Menu of TDM Strategies: Non-Infrastructure Strategies*

6, the non-infrastructure menu, and discussed in detail in the next section are organized into the following categories: amenities, policies, developer/employer programs, employer programs, partnerships, and innovation. A well-rounded, effective, and sustainable TDM plan includes complementary strategies from multiple categories.

Please refer to Appendix A for a detailed description of each strategy, applicability, minimum standards, and plan guidance. Points will be awarded based on whether the measure meets the standards and guidance laid out in Appendix A.

Table 2-6 Menu of TDM Strategies: Non-Infrastructure Strategies*

Category	Name	Description	Points
Amenities	Micromobility Fleet	Provide e-bikes, e-scooters, or other micromobility devices to employees for business and personal use during the workday.	1-2
	Real-Time Travel Information Screens	Provide displays in key locations in developments which display real-time information about transportation services. Screens must cover three different travel options and be located in high-traffic areas (i.e., building lobby, elevator, mail kiosk).	1
	Mobile On-site Amenities	Provide access to on-site amenities such as: food trucks, mobile bike repair services, and mobile hair salons that reduce the need to drive for errands during the workday.	1
Developer/ Employer Programs	Transportation Subsidy/ Incentives Budget	Establish and spend budget to subsidize alternative travel modes. Examples include providing monthly transit passes to employees, reimbursing a monthly vanpool cost or paying a monthly bicycle benefit.	1-10
	Marketing and Outreach	Implement a marketing and outreach program to educate commuters about the transportation programs and services available to them and to encourage sustainable travel choices.	1-4
	Ridematching Services	Develop an internal ridematching program or promote existing ridematching platforms, such as Carlsbad Commuter.	1
	GRH Services	Develop an internal guaranteed ride home program or utilize SANDAG’s GRH program.	1

	Establish and Maintain Partnerships with Area Businesses/Properties	Create and implement TDM cost sharing partnerships with area businesses/properties to address shared trip mitigation resources and efforts. Example: joint shuttle to train station.	1-5
	Establish and Maintain Partnerships with Private Vendors	Create and implement partnerships with private vendors that create measurable levels of local service delivery of things such as a shuttle service, micro-mobility, dynamic ridesharing, and other services.	1-5
Employer Programs	Telework Program	Implement a formal telework program that allows eligible employees to work from home at least one day per week.	1-5
	Flexible/Alternative Work Schedules	Implement flexible/alternative work schedules that allow employees to work longer hours and fewer days during a week or two-week period.	1-2
	Alternative Transportation Incentive	Offer cash payments to employees who do not drive alone, such as parking cash out.	1-10
	Commuter Tax Benefits	Offer pre-tax commute benefits to employees allowing them to pay for qualifying commute expenses with pre-tax funds.	1
	Customized Travel Plans	Provide customized travel plans to employees along with programs and incentives that are available to them.	1
Innovation	Innovation	Any other strategies to reduce single-occupancy trips to the worksite will be considered. Strategies that have been implemented successfully at other developments, including other geographies, are encouraged.	1-5

*If a strategy is contingent upon a partnership with a third party for implementation and the company becomes defunct, the product becomes obsolete or otherwise unusable, the applicant should work with the TA to identify a suitable alternative.

2.8 Monitoring, Reporting, Amendments, and Enforcement

2.8.1 Duration of the TDM Requirement

TDM plans for new developments remain in place for the life of the development regardless of ownership, though it may be amended for a variety of reasons (see Section 2.8.3). If the property is sold, the new owner may choose to file a TDM plan amendment or prepare a new TDM plan. Any changes in ownership or property management require the designation of a new TC.

TDM plans for tenant improvements remain in place for the life of the tenancy and do not transfer to a new tenant. However, if the tenant subleases all or part of the space, the tenant remains responsible for ensuring that the sublessee complies with the approved TDM plan and remains the official TC on file. This can take the form of coordinating all programming and monitoring for the worksite or including the TDM requirements in the lease agreement and ensuring that requirements are met.

2.8.2 Monitoring and Reporting Requirements

All development projects subject to the TDM ordinance must implement the strategies approved in the plan. Upon plan approval, the TC shall conduct a baseline employee commute survey and follow-up surveys every two years. Along with survey results, the applicant shall submit a status report of non-infrastructure TDM strategies specified in the plan. The report shall be submitted to the city within one month of the conclusion of the reporting period. In addition, the City of Carlsbad reserves the right to perform periodic inspections.

The baseline survey must be conducted within 12 months of reaching 75 percent occupancy or within 18 months of initial occupancy, whichever occurs first. Developments with multiple buildings or phases must conduct employee surveys within 12 months of reaching 75 percent occupancy of the first building or within 18 months of initial occupancy of the first building, whichever occurs first. If specified in the TDM plan, leases may stipulate that the employer tenant(s) will administer employee commute surveys on the same schedule.

Carlsbad's Transportation Administrator tracks the monitoring periods for each project and will contact the development's Transportation Coordinator when surveys are due to ensure compliance with TDM Plan monitoring requirements. The city will provide a survey template and specific instructions to facilitate and standardize data collection and reporting.

All employee commute surveys shall achieve a minimum confidence interval of 5 percent at the 95 percent confidence level, or a 40 percent response rate, whichever number is higher, unless otherwise specified by the City of Carlsbad. The survey shall be conducted during designated survey windows in the spring (April) or in the fall (September), unless otherwise directed by the city, with subsequent surveys conducted during the same reporting period.

To ensure that a site will achieve the 2035 alternative mode share goal, interim goals were created. Table 2-7 Alternative Transportation Mode Share Goals shows the current, interim, and final alternative mode share goals for both new developments and existing buildings/tenant improvements. The developer is not expected to achieve mode share goals by the time the baseline survey is conducted but is expected to meet the respective mode share goals of the period in which future reporting falls. For example, a new development that reaches 75 percent occupancy in 2021 will conduct its baseline survey by 2022. The first follow up survey, due in 2024, is expected to reach a 25 percent alternative mode share. The next two surveys, due in 2026 and 2028 will require an alternative mode share of 30 percent. The following two surveys in 2032 and 2034 will require an alternative mode share of 35

percent and the 2036 survey will need to show a 40 percent alternative mode share for the development to comply.

Table 2-7 Alternative Transportation Mode Share Goals

Period in which Reporting Falls	Alternative Mode Share Goals	
	New Developments	Existing Buildings/Tenant Improvements
Present till 2025	25%	24%
2025 - 2029	30%	26%
2030 - 2034	35%	28%
2035 on	40%	30%

2.8.3 TDM Plan Amendments

An approved TDM plan may be amended for the following reasons:

- Designation of a new transportation coordinator.
- A strategy may become unavailable or ineffective and must be replaced by another TDM strategy.
- New strategies or transportation options become available as technology changes.
- The plan fails to reach its mode share goal.
- If the property is sold, the new owner may choose to file a TDM plan amendment or prepare a new TDM plan.
- Future tenant improvements at employers with an approved TDM plan require additional TDM infrastructure due to insufficient capacity or significant employee or visitor growth.

Amendment process:

1. To update the Transportation Coordinator: email the completed and signed TC Designation Form (Appendix F) to landdev@carlsbadca.gov.
2. To amend a TDM plan: email landdev@carlsbadca.gov to start the amendment process. City staff will reach out to assist with the amendment process.

2.8.4 Enforcement

Projects are subject to physical inspection or audit to ensure that TDM infrastructure and amenities remain available at the property. Developments that fail to reach the mode share goal, will be asked to submit an amended TDM plan. Failure to participate in the monitoring and reporting or to achieve the required response rate will result in the actions described below.

1. Failure to achieve the required response rate by less than 10 percentage points:

- a. The difference between the percentage of survey respondents and the goal will be recorded as drive alone trips.
2. Failure to achieve the required response rate by more than 10 percentage points:
 - a. The property will be required to conduct its survey again in the next survey window.
 - b. Required compliance assessment with Carlsbad Commuter to be scheduled within two weeks of the reporting deadline and completed within two months of the reporting deadline.
3. Failure to participate in the survey:
 - a. The property will be required to conduct its survey again in the next survey window.
 - b. Required compliance assessment with Carlsbad Commuter to be scheduled within two weeks of the reporting deadline and completed within two months of the reporting deadline.

Failure to maintain infrastructure and non-infrastructure elements of the plan, participate in monitoring or achieve the mode share goal may trigger additional requirement by the TA or enforcement actions pursuant to **Chapter 18.51.080 of the Carlsbad Municipal Code.**

3 General Plan Mobility Element TDM Plan Requirement

3.1 Background

Residential and non-residential development projects that do not fall under the ordinance may be required to prepare a TDM plan under the General Plan Mobility Element. Section 3-P.11 contains the following requirement:

3-P.11 Require new development that adds vehicle traffic to street facilities that are exempt from the vehicle LOS standard (consistent with 3-P.9) to implement:

- a. Transportation demand management strategies that reduce the reliance on single-occupant automobile and assist in achieving the city’s livable streets vision.*
- b. Transportation system management strategies that improve traffic signal coordination and improve transit service.*

3.2 Thresholds for Compliance

The TDM plan requirement above is applicable to all projects that meet the threshold for average daily trips or peak hours trips per the Local Mobility Analysis guidelines.

3.2.1 Tiered Requirements

Non-Residential

Any non-residential projects that trigger a TDM plan requirement under the General Plan Mobility Element but not under the TDM ordinance are required to complete a Tier 1 TDM Plan using the instructions in this chapter.

Residential

Requirements for residential project vary by the number of dwelling units.

Table 3-1: Tiers by Number of Dwelling Units

Dwelling Units	New Development
< 50	Tier 1
50 - 99	Tier 2
100 or more	Tier 3

Mixed-Use

For mixed-use projects, non-residential and residential uses will be evaluated separately and must prepare TDM plans for each use that triggers the General Plan Mobility Element independently.

Mobility Element TDM Plan Requirements

A Mobility Element TDM plan requires the following plan elements, which are further described in [Section 3.5](#) and the Mobility Element TDM Plan Template (Appendix D):

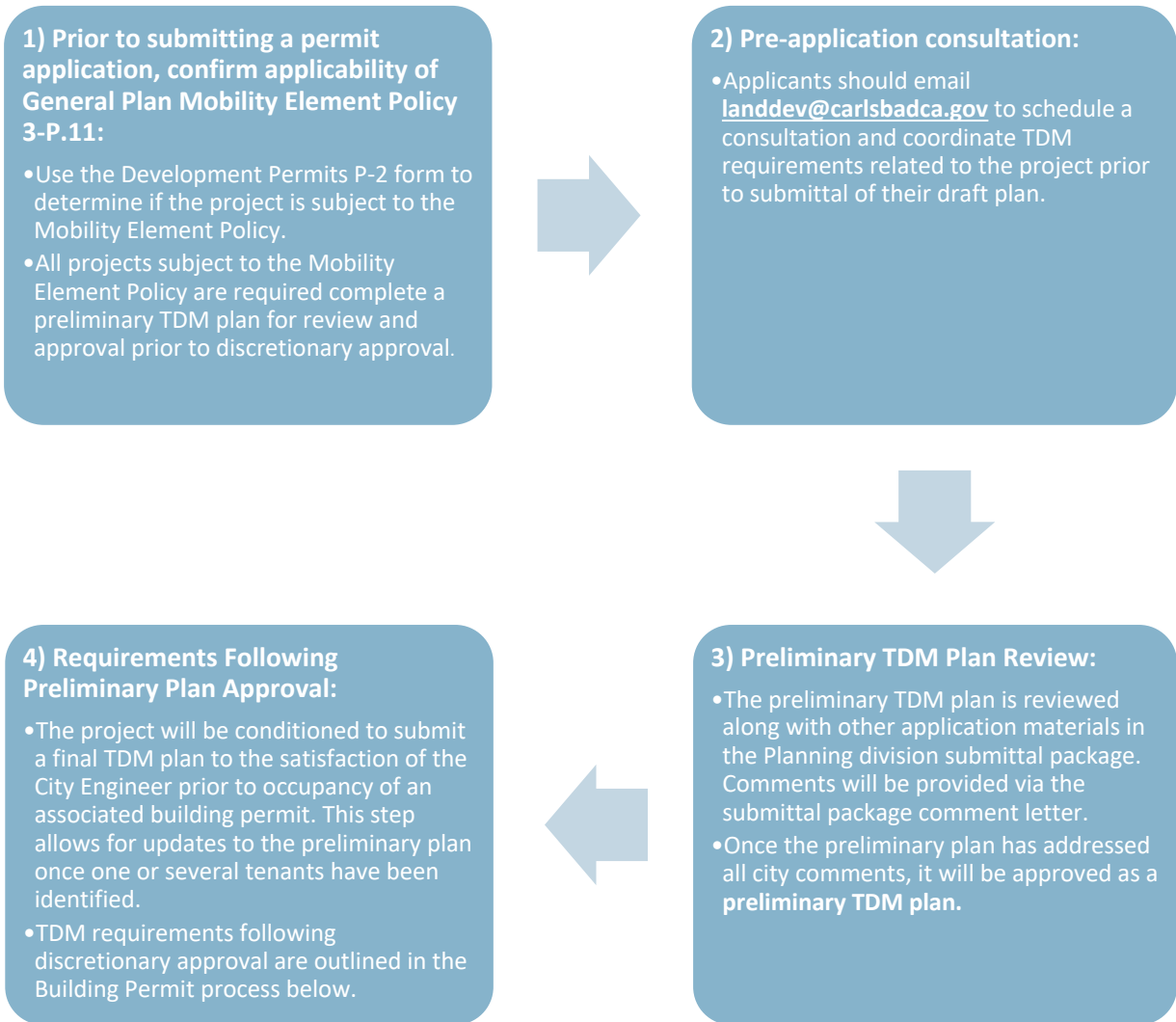
- Existing conditions and context
- A selection of infrastructure improvements that achieves the following total number of points:

Table 3.2: Required Points by Tier

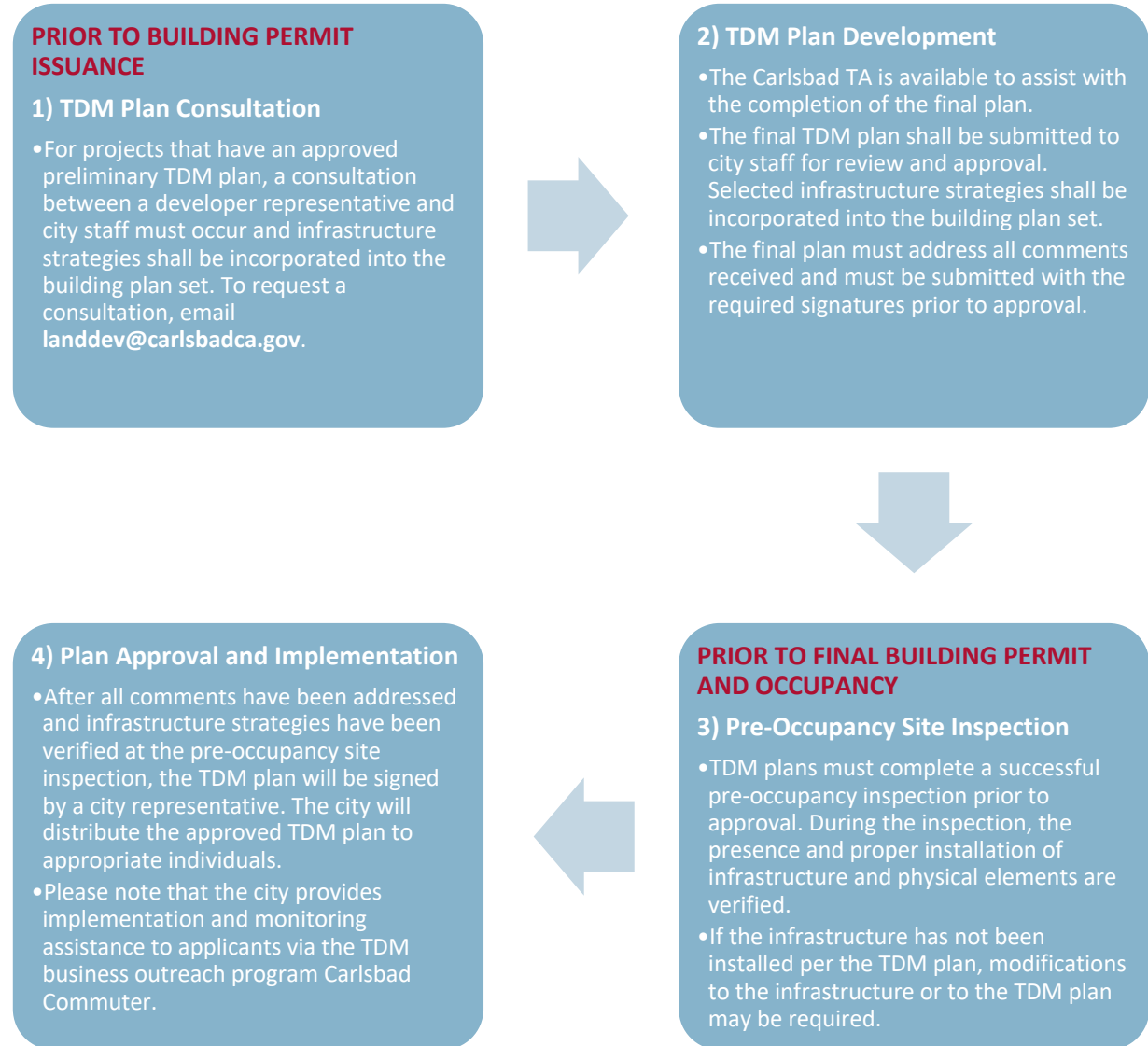
	Required Points*	Elective Points	Total Points
Tier 1	1	2	3
Tier 2	1	4	5
Tier 3	1	6	7

3.3 Mobility Element TDM Plan Review and Approval Process

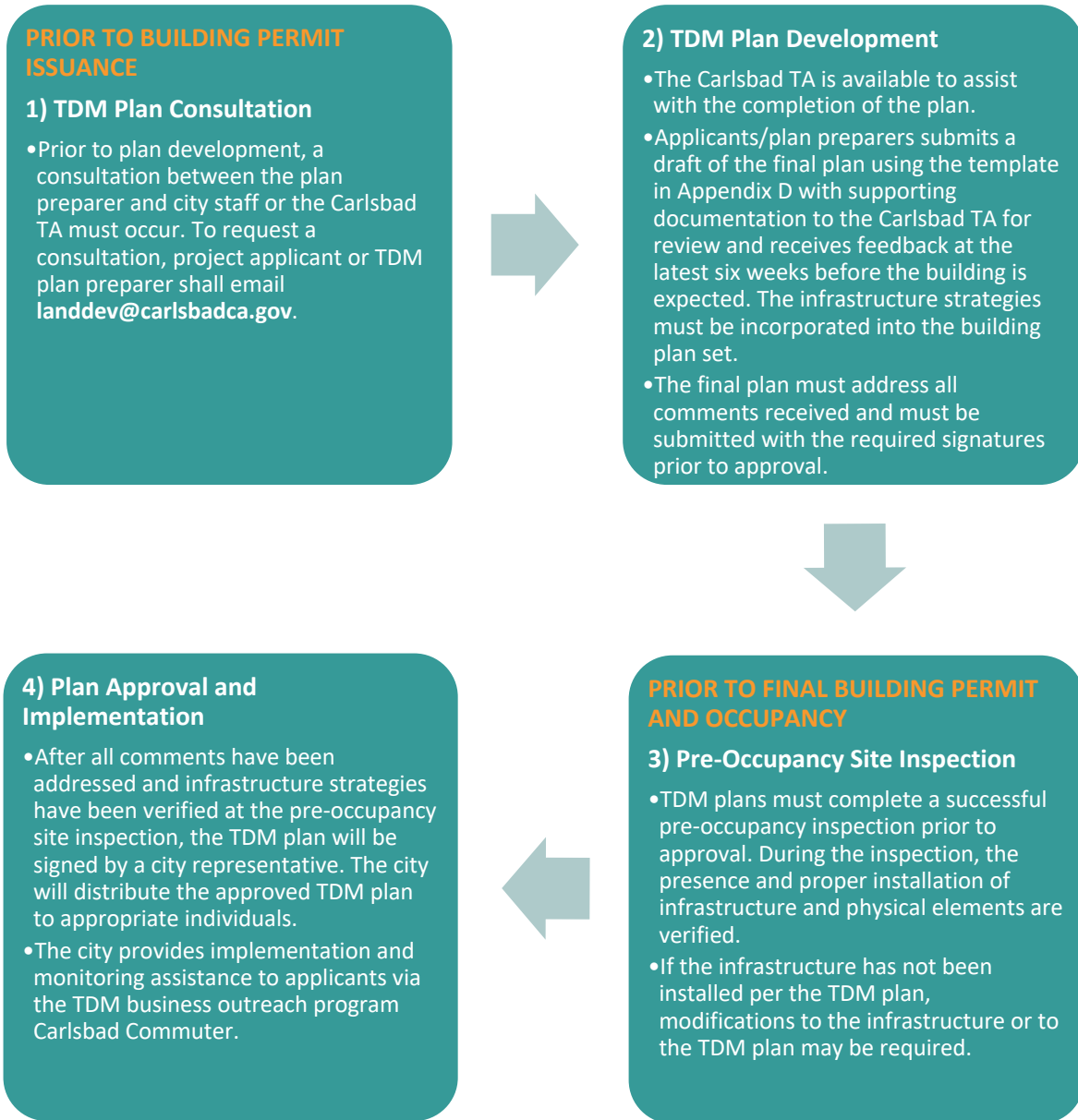
Discretionary Permits (if applicable)



Building Permits – Projects with a Preliminary Plan on File



Building Permits – Projects with no Preliminary Plan on File



3.4 Required Strategy

As laid out in Table 3-3 below, the required strategy yields one point towards the required total number of points.

Table 3-3 Menu of TDM Strategies: Required Strategies

Category	Name	Description	Points
Required	Designated Transportation Coordinator (TC)	Designate an on-site Transportation Coordinator responsible for ensuring compliance with City of Carlsbad TDM Plan requirements.	1

Designated Transportation Coordinator (TC)

All developments are *required* to designate a transportation coordinator responsible for ensuring that infrastructure and amenities are maintained as described in the approved TDM Plan. The designated TC should be on-site, unless otherwise approved by the City of Carlsbad. The TC ensures compliance with City of Carlsbad TDM Plan monitoring requirements.

This requirement is active for the life of the TDM plan and must be in place prior to occupancy. If a property changes hands, a new property manager is hired, or staff turns over, a new TC must be designated using the TC designation form in Appendix F.

Plan Guidance: Complete the TC Designation Form.

3.5 Strategy Selection

All Mobility Element TDM plans require the selection of infrastructure strategies. **Reference Appendix A for detailed guidance and standards for each strategy.**

Some strategies contain a range of points. The applicant will work with the TA to determine the likely effectiveness of the strategy based on the unique attributes of the site and proposed development. In general, the point value is relative to the level of effort and the applicability of a strategy based on the development context.

The menu of strategies will be reviewed periodically by city staff to adjust point values of TDM measures as necessary or to add new measures. The revised menu of TDM strategies will only be used for new application, however, a property owner may file a TDM plan update application containing revised strategies at any time for review and approval by the city.

3.5.1 Elective Strategies

Applicants may select strategies from the following menu to achieve the required point value. **Some strategies only apply to residential or non-residential uses and are listed as such.**

A formal site visit (pre-occupancy inspection) will be scheduled to confirm that infrastructure improvements have been completed and located as agreed upon in the TDM Plan prior to occupancy.

Table 3-4 provides high level descriptions of the strategies and the point value. Appendix A provides additional details on each strategy.

Table 3-4: Infrastructure Strategies

Category	Name	Description	Points
All Properties	Secure Bike Parking	Provide a secure, weather-protected bike cage or bike room for residents/employees.	1
	Public Bike Racks	Provide public bike racks near the building entrances for all cyclists.	1
	Bicycle Repair Station	Provide on-site tools and space for bicycle repair. Bike repair stations shall include repair stands, air pumps, and other tools and resources necessary to quickly repair a bike.	1
	Micromobility Parking	Provide parking and charging infrastructure for micromobility devices, e.g., bike share, e-bikes, and e-scooters.	1
	Car Share Parking and Vehicles	Provide one or several car share vehicles along with preferential parking that is close to the building entrance, covered, or otherwise preferable.	1-2
	On-site Amenities	Provide onsite amenities for residents/employees that reduce the need to drive. Residential examples include a gym, pool, or business office. Non-residential examples include onsite childcare, restaurants and shops, wellness centers, and other employee convenience services that reduce the need to drive for errands during the workday.	1
	Bicycle and Pedestrian Connections	Improve pedestrian and bicycle connectivity onsite or adjacent to the site consistent with the city’s Sustainable Mobility Plan and related bicycle and pedestrian planning efforts. Provide direct routes from public sidewalk to each building in the project.	1

	Passenger Loading Zone	Provide signed passenger loading curb space for shuttle, microtransit, ride-hailing or carpooling pick-up/drop off.	1
	Innovation	Any other physical site-improvement at the property to reduce single-occupancy vehicles will be considered.	1-5
Residential Only	Mixed-Use Component	Development contains neighborhood-serving uses, such as on-site childcare, restaurants and coffee shops, wellness centers, grocery stores, banks/ATM, dry cleaning, or similar services that reduce the need for residents to drive.	1
	Delivery Supportive Amenities	Provide amenities that facilitate deliveries at multi-family properties. Offer secure temporary storage for package deliveries, laundry service, or other deliveries, temporary refrigerated storage for grocery deliveries.	1
Non-Residential Only	Preferential Parking for Car/Vanpools	Provide preferential parking for car and vanpool vehicles that is close to the building entrance, covered, or otherwise preferable.	1
	End of Trip Facilities	Provide showers, lockers, and changing rooms for employees who use active transportation to get to work.	1

3.6 Monitoring, Reporting, Amendments and Enforcement

3.6.1 Duration of the TDM Requirement

TDM plans for developments remain in place for the life of the development regardless of ownership. If the property is sold, the new owner may choose to file a TDM plan amendment or prepare a new TDM plan. Any changes in ownership or property management require the designation of a new TC.

For residential projects, the TDM plan must be incorporated by reference into the CC&Rs to ensure implementation of the plan and to notify homeowners of the project’s TDM requirements.

3.6.2 Monitoring and Reporting

All development projects subject to the TDM plan requirements under the General Mobility Element policy must implement the strategies approved in the plan and are subject to monitoring and biennial reporting as specified in the approved project TDM plan. Reporting requires confirmation that implemented strategies remain in place and in good condition. The city will provide a reporting template and specific instructions. In addition, the City of Carlsbad reserves the right to perform periodic inspections.

3.6.3 TDM Plan Amendments

An approved TDM plan may be amended for the following reasons:

- Designation of a new transportation coordinator
- If the property is sold, the new owner may choose to file a TDM plan amendment or prepare a new TDM plan.

Amendment process:

1. To update the Transportation Coordinator: email the completed and signed TC Designation Form (Appendix F) to landdev@carlsbadca.gov.
2. To amend a TDM plan: email landdev@carlsbadca.gov to start the amendment process. City staff will reach out to assist with the amendment process.

3.6.4 Enforcement

Projects are required to implement all TDM measures in accordance with the approved project TDM plan. The project site is subject to physical inspection to ensure that TDM infrastructure and amenities remain in place and in good condition. Projects that fail to implement the measures in their TDM plan are subject to enforcement measures prescribed in the project conditions of approval and the city's municipal code.

4 TDM Business Outreach Program

4.1 Program Purpose

The City of Carlsbad provides a voluntary citywide TDM program to help employers and property managers integrate TDM strategies into their business operations. The program, Carlsbad Commuter, supports Measure K-1 of the Climate Action Plan, which requires the adoption of a citywide TDM plan and is provided in collaboration with Life in Action. Carlsbad Commuter is available to assist developers with implementation of their approved TDM plan in accordance with the TDM ordinance.

Carlsbad businesses are strongly encouraged to participate in the voluntary TDM program. In addition to the health, productivity, recruitment/retention, cost savings, and other benefits to TDM programming, participating businesses will be recognized as champions and leaders in the community.

In addition to business resources, Carlsbad Commuter also offers commuting resources directly to those who live and work in Carlsbad.

4.2 Business Resources

The Carlsbad Commuter program aims to offer relevant and timely resources to businesses and commuters. It focuses on providing implementation resources and is designed to adapt to the needs of Carlsbad employers, employees, and residents. Examples of program offerings include:

- Ridematching tool to help commuters find carpool partners
- Resources for implementing commute benefits
- Trip tracking app allowing employees to earn prizes
- Tips and tricks for more sustainable commuting
- Expert assistance with implementing new programs, campaigns, or strategies
- Remote and hybrid work resources

The Carlsbad Commuter program collaborates with the regional SANDAG iCommute program. As a result, Carlsbad employers have access to both local and regional resources to help implement TDM strategies and plans.

4.3 Get Started

Visit Carlsbad Commuter and learn more about the current offerings and gain access to valuable additional resources services, and programs.

4.4 Exemplary Business TDM Programs in Carlsbad

The City of Carlsbad's business community is home to several employers with successful TDM programs. Through partnerships with iCommute, Carlsbad Commuter and various transportation services, these employers provide notable TDM programming at their worksites and with their employees.

The following summaries of exemplary business TDM programs in Carlsbad were generated prior to the COVID-19 pandemic. Their associated pandemic-related innovations to TDM programs and policies will be updated upon availability.

ViaSat

ViaSat is a global communications company, located in Carlsbad approximately four miles east of I-5. The multi-building campus accommodates approximately 2,500 of the almost 5,000 global employees.

ViaSat offers employees a comprehensive commuter benefits package to attract and retain top talent.

The TDM Plan

Facilities	Secure bicycle parking On-site employee bikeshare for inter-campus transportation On-site shower facilities On-site café and coffee shop Fitness center/wellness center
Programs	Periodic on-campus bike maintenance Wellness incentives Waze Carpool partnership

The Rationale

ViaSat’s campus has many on-site amenities to encourage employees to reduce off-site trips. These include a wellness center offering a range of health care services, fitness center with showers, café, coffee shop, and conference space. ViaSat also invests in programs that complement its facilities, such as employee bike share, a free fitness membership incentive, and support for biking to work and throughout the campus.

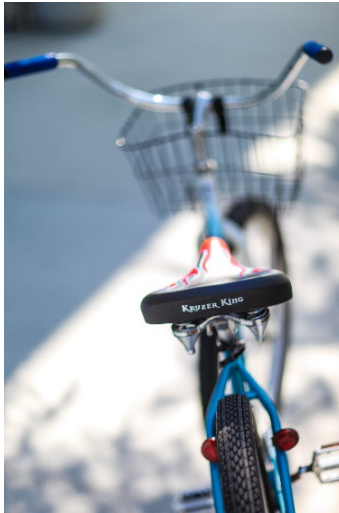


Figure 4-1 Campus Bikeshare



71% drive alone mode share



Bronze iCommute Diamond Award winner
Recognized three years running



Innovations
Biking benefit
Waze Carpool partnership
Employee bike share



Testimonial
“TDM supports the health of both our employees and the environment; it’s a win-win.”
-Social Impact Team

Thermo Fisher Scientific

Thermo Fisher Scientific is the world leader in serving science, with revenues of more than \$20 billion and approximately 70,000 employees globally. Approximately 2,000 employees work at Thermo Fisher’s Carlsbad facility.

Thermo Fisher has been an active participant in the SANDAG regional TDM program, iCommute. In 2016, the company was recognized with a Platinum Diamond Award for its contributions to traffic mitigation, reduced emissions, and enhanced regional mobility.

The TDM Plan

Facilities	Shower & lockers Priority carpool/vanpool parking
Programs	Enterprise vanpool subsidy Try Transit program
Education	Lunch & learn sessions Participation in Earth Day Fair Commuter intranet page
Marketing & Outreach	Earth Day and Bike to Work Day campaigns Promoting Annual Rideshare Month Commute Challenge

The Rationale

Thermo leverages its company-wide intranet and Yammer, a social media tool, to promote commuter benefits, boost visibility, facilitate online discussion and provide helpful resources.

Marketing and outreach efforts also are a large component of the company’s commuter benefits program. In addition to posting educational and promotional information site-wide, Carlsbad site leadership actively promotes regional campaigns such as Earth Day, Bike to Work Day, and the annual Rideshare Month Commute Challenge in October (sponsored by iCommute).

Thermo Fisher’s Carlsbad site also hosts lunch and learn events featuring Q&A sessions with SANDAG and other local service providers so that employees can become more familiar with their sustainable travel options.

Many employees expressed interest in vanpool, carpool and riding transit. Thermo Fisher also offers a vRide vanpool program with SANDAG subsidies to employees.



71% drive alone mode share
Sustainable mode share rose by more than 15% between 2014 and 2016



Platinum iCommute Diamond Award winner
Recognized for Program Excellence



Innovations
Commuter Specific Intranet
Subsidized Vanpool
Annual Rideshare Challenge



Testimonial
“Even though the train takes longer than driving, I can get work done or do other things since the train has WiFi.”
Ivan Tesic, Program Manager

Common Grounds

Common Grounds is a creative co-working space featuring a host of on-site amenities designed to provide members with more commute options. The Carlsbad Common Grounds campus is located on Embarcadero Lane, near the Poinsettia Station, with access to the COASTER and Amtrak.

The TDM Plan

Facilities	Bike repair station Basic bike racks Showers & lockers On-site amenities (café)
Programs	Complimentary bike- & skateboard-share for members Complimentary bike tune-ups Complimentary COASTER passes Incentives for transit riders
Marketing & Outreach	COASTER highlight in videos and on website Transit information display in lobby TV Bike to Work Day pit stop with raffle prizes
Other	New tenant information packet

The Rationale

Common Grounds is an innovative and flexible workspace that prioritizes amenities for its members and office tenants. The company conducted a commute survey and has introduced TDM strategies as benefits to their tenants. Nearly 60 percent of survey respondents indicated they would like to try transit; therefore, the company initiated a rewards program that offered goodie bags to those who ride the COASTER to work. COASTER service is also advertised prominently on the Common Ground Carlsbad website.

The company also hosted an exemplary 2017 Bike to Work Day pit stop with additional raffles for bicycle commuters.



Figure 4-2
Complimentary
Bikeshare for
Common Grounds
Members.



70% drive alone mode share
65% of survey respondents were willing to try an alternative mode



Bronze iCommute
Diamond Award
winner



Innovations
Community bike share and tune-ups
Transit goodie bags



Testimonial
“The biggest factor in getting people to bike to work is having many amenities and services on site. Having a place for people to shower, change and store their workout clothes is huge. Providing services like dry cleaning, alleviates those errand runs that people need to make during the day.”
 Julia Deluca,
 Community Director

A. Strategy Details and Guidance

This section provides detailed guidance for each strategy. Unless otherwise noted, strategies are applicable to both residential and non-residential applications.

Required Strategies – Ordinance and Mobility Element

Designated Transportation Coordinator (TC)

All developments are *required* to designate a transportation coordinator responsible for ensuring that infrastructure is maintained, policies and programs are implemented, and amenities and partnerships are maintained as described in the approved TDM Plan. The designated TC should be on-site, unless otherwise approved by the City of Carlsbad. The TC ensures compliance with City of Carlsbad TDM Plan requirements and must attend an introductory meeting and complete a TC training.

Required Strategies – Ordinance Only

If a property changes hands, a new property manager is hired, or staff turns over, a new TC must be designated using the TC designation form.

Plan Guidance: Complete the TC Designation Form.

Distribute New Employee/Resident Transportation Information

All developments are required to ensure that transportation options information is distributed to new employees during the hiring and orientation process or to new residents at move-in.

Citywide TDM Program

All developments are required to meet with the citywide TDM programs outreach staff on a regular basis (at least annually) and participate in/promote at least two events held by the citywide TDM program.

(SHELL BUILDINGS AND MULTI-TENANT BUILDINGS ONLY) TDM in Leases

All shell buildings and multi-tenant buildings must establish requirements in lease agreements that require tenants to implement and promote the strategies detailed in the approved TDM plan and comply with the monitoring requirements, such as distributing an employee commute survey and achieving required response rates. Lease agreements must include a copy of the TDM plan and specify which TDM plan commitments must be implemented by the tenant. The

building owner remains responsible for TDM plan compliance and must provide a transportation coordinator.

Note: Tenants applying for a building permit have the option to choose the property's TDM plan or create their own. If they choose their property's TDM plan, they must complete the TDM Plan Acknowledgment Form in Appendix G before the building permit is issued. If they trigger a higher tier level, they must create their own TDM plan for city approval.

Elective Infrastructure Strategies

Secure Bike Parking

This category includes bike lockers or a secure, weather-protected bike cage or bike room for long-term parking for employees. Secure bike parking must be made available to employees and residents at no cost. The minimum number of secure bike parking spaces to be included vary by use and must be rounded up (i.e., a 12,500 sq. ft. office development would require a minimum of 3 secure spaces):

- Office: 1 per 5,000 sq. ft. of space (minimum of 2)
- Restaurant: 1 per 5,000 sq. ft. of space (minimum of 2)
- Retail: 1 per 15,000 sq. ft. of space (minimum of 2)
- Industrial/Manufacturing: 1 per 15,000 sq. ft. of space (minimum of 2)
- Warehousing: 1 per 25,000 sq. ft. of space (minimum of 2)
- Residential Multi-Family: 1 per dwelling unit for first 100 dwelling units, then 1 per 4 dwelling units for the remainder of the units (minimum of 2)
- Residential Single-Family: not applicable

Secure bike parking must fulfill the following minimum standards:

- It must be easy and safe to access and park a bike.
- Bike lockers must be installed at ground level and may not be stacked.
- 50% of secure bike parking spaces (or at least one) must accommodate large, non-standard bikes (e-bike and/or cargo bike)
- Access must be limited to employees who register to obtain a key, code, or key card to access the secure bike parking. A system must be put in place for retrieving access cards or keys or re-set the access code when an employee leaves (or a protocol to re-set the code). The list of current users must be regularly updated.
- Bikes must be lockable to a rack inside the bike cage/room, unless it is a bike box/locker designed for a single bike.
- Residential only: Up to 30% of bike parking spaces may be provided with vertical racks.

Bike parking shall follow the bike rack and installation guidance laid out in “**Essentials of Bike Parking**”⁴ published by the Association of Pedestrian and Bicycle Professionals (APBP) to ensure that racks are installed with proper clearance and are easily accessible.

⁴ Essentials of Bike Parking Revision 1.0, September 2015, Association of Pedestrian and Bicycle Professionals (APBP).

Plan Guidance: Secure bike parking must be made available to employees at no cost. Indicate the number of secure, long-term bike parking spaces to be provided, how they will be accessed and where they will be located on the project site (include on building/site plan). Refer to the handbook for the number of spaces required to earn points. Please consult “Essentials of Bike Parking” by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide guidance to the installer. Unapproved types of secure bike parking or poorly installed facilities may not pass inspection.

Public Bike Parking

Provide public bike racks near the building entrances for all bicyclists, including retail customers and visitors. The number of required spaces depends on whether secure bike parking is provided as well:

- If secure bike parking is provided to employees or residents, the required number of bike parking spaces is that listed under public bike parking in Table 2-5, unless otherwise recommended by TA.
- If no secure bike parking is provided to employees or residents, the required number of bike parking spaces includes the number listed for employee/resident bike parking plus the number listed for public bike parking in Table 2-5, unless otherwise recommended by TA.
- More public bike parking may be required depending on the setting and the nature of the business.

Table 2-5 Bike Parking Requirements

Use	Employee/Resident Bike Parking	Public Bike Parking
Office	1 per 5,000 sf of space (min of 2)	1 per 80 parking spaces* (min of 2)
Office (high visitor traffic)**	1 per 5,000 sf of space (min of 2)	1 per 20 parking spaces* (min of 2)
Restaurant	1 per 5,000 sf of space (min of 2)	1 per 10 parking spaces* (min of 2)
Retail	1 per 15,000 sf of space (min of 2)	1 per 10 parking spaces* (min of 2)
Industrial/ Manufacturing	1 per 15,000 sf of space (min of 2)	N/A
Warehousing	1 per 25,000 sf of space (min of 2)	N/A
Residential	1 per dwelling unit for first 100 units, then 1 per 4 dwelling units for the remaining number of units (min of 2)***	1 per 20 units (min of 2)

*Planned or existing

**Examples: medical office, public agency

*** Bike parking is not applicable at residential single-family developments

Bike racks shall follow the bike rack and installation guidance laid out in “**Essentials of Bike Parking**”⁵ published by the Association of Pedestrian and Bicycle Professionals (APBP). Note that any bike racks proposed on public right-of-way require approval by the City of Carlsbad.

Plan Guidance: Indicate the number of short-term spaces and the type of bike racks to be provided and where they will be located on the project site. Include bike parking locations on the site plan. Please consult “Essentials of Bike Parking” by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide the type of bike rack and installation guidance to the installer. Unapproved bike rack types or poorly installed racks may not pass inspection.

Bicycle Repair Station

Provide on-site tools and space for bicycle repair. Bike repair stations shall include repair stands, air pumps, and other tools and resources necessary to quickly repair a bike. Bike repair stations need to be easily accessible and ideally located near bike parking.

Plan Guidance: Describe what items will be included in the bicycle repair station and where it will be located within the project site. If it is not a fixed bicycle repair station located near bike racks or in a bike cage or bike room, describe how it will be accessed. Indicate bicycle repair station guidance on the site plan.

Micromobility Parking and Charging

Provide parking and charging for micromobility devices, such as dockless and docked shared or individually owned bikes, scooters, e-bikes, and similar services. The space must: (1) provide electricity (actual cost plus a reasonable administrative fee may be charged); (2) provide adequate space to allow for the simultaneous charging and storage of four or more bicycles (this requirement does not preclude the storage of non-bicycle mobility devices).

Plan Guidance: Indicate where micromobility parking space will be located on the project site. Include locations and charging facilities on the site plan.

Preferential Car Share Parking and Vehicles

Provide one or several car share vehicles along with preferential parking that is close to the building entrance, covered, or otherwise preferable.

Plan Guidance: Describe how car share vehicles will be provided (third party-vendor, in-house, etc.). Indicate the number of vehicles and reserved spaces to be and where they will be located on the project site. Indicate whether membership will be fully or partially subsidized for employees/residents.

On-Site Amenities

- Non-Residential: Provide access to on-site amenities such as on-site childcare, restaurants and shops, gyms and other wellness centers, and other employee convenience services that reduce the need to drive for errands during the workday.

⁵ Essentials of Bike Parking Revision 1.0, September 2015, Association of Pedestrian and Bicycle Professionals (APBP).

- Residential: Provide onsite amenities for residents that reduce the need to drive. Examples include a gym, pool, or business office. On-site amenities and mixed-use points cannot be claimed in the same TDM plan.

Plan Guidance: Discuss the on-site amenities that will be located at the development and explain how these offerings will reduce trips for the project's users. Discuss discounts available to residents/employees if applicable. Provide details associated with each amenity and a map showing the location of these amenities.

Bicycle and Pedestrian Connections

Improve pedestrian and bicycle connectivity consistent with the city's Sustainable Mobility Plan and related bicycle and pedestrian planning efforts. Provide on-site pathways that are a minimum of 10 feet in width that allow pedestrians and cyclists to connect from adjacent roadways, bike lanes and sidewalks to the main entrance of a building(s). Provide pedestrian connections within the site to enable safe and comfortable travel between buildings and across parking lots. Residential developments should demonstrate that a safe route to school and transit is provided to nearby schools and transit stations within a half mile walking distance.

Plan Guidance: Provide a map showing proposed pedestrian and bicycle infrastructure and connections to existing facilities.

Passenger Loading Zone

Provide signed passenger loading space on the property for passenger drop off that includes shuttle, microtransit, ride-hailing, or carpooling pick-up/drop off. Loading zone must be on-site.

Plan Guidance: Describe location of the loading zone and its intended use and denote it on the building/site plan.

Innovation (Infrastructure-Based)

Any other physical site-improvement at the worksite with the purpose to reduce single-occupancy vehicles will be considered. Improvements that have been implemented successfully at other developments, including other geographies, are encouraged.

Plan Guidance: Work with the TA to define a strategy and determine point value.

Residential Only

Mixed-Use Component

Development contains neighborhood-serving uses, such as on-site childcare, restaurants and coffee shops, wellness centers, grocery stores, banks/ATM, dry cleaning, or similar services that reduce the need for residents to drive. Mixed-Use points and onsite amenity points cannot be claimed in the same TDM plan.

Plan Guidance: Discuss the non-residential uses that will be located at the development and explain how these offerings will reduce trips from the development's residential uses. Discuss discounts available to tenants if applicable. Provide a map showing the location of these amenities.

Delivery Supportive Amenities

Provide amenities that facilitate deliveries at multi-family properties. Offer secure temporary storage for package deliveries, laundry service, or other deliveries, temporary refrigerated storage for grocery deliveries.

Plan Guidance: Describe the type and location of the storage being provided and how residents will access their packages (automated locker system, storage room managed by onsite staff, etc.).

Non-Residential Only

Preferential Parking for Car/Vanpools

Provide preferential parking for car- and vanpool vehicles that is close to the building entrance, covered, or otherwise preferable. The only parking spaces with higher preference are ADA parking spaces. Carpool/vanpool spaces must have signs reading “Carpool/Vanpool Parking Only” and building owners must have an enforcement policy in place to assure the spaces are used only by carpoolers and vanpoolers. Guidance on the number of carpool spaces is as follows:

- For tenant improvements in buildings that do not currently offer any type of carpool or vanpool parking:
 - Up to five percent of the number of parking spaces allocated to the tenant improvement suite/space
 - The number of spaces designated can fluctuate based on demand, but at no point can be less than two percent or one, whichever is larger. If the number of assigned spaces is less than five percent of total spaces the property manager must notify tenants of the availability of additional spaces at least twice per year.
 - Signage must be procured for 5% of spaces prior to occupancy.
- For new construction or tenant improvements in buildings that currently offer clean air parking spaces required by CALGreen:
 - Beyond any CALGreen required spaces, an additional two to five percent of total parking spaces must be made available exclusively for carpool/vanpool parking. Two percent are required to be provided immediately. The remaining 3% can be converted over time based on demand. Prior to occupancy, the City of Carlsbad will require that signage has been procured for 5% of spaces, even if only 2% will be implemented at first. Carpool/vanpool spaces should be preferential to clean air parking and following ADA parking spaces in the hierarchy.
 - The number of car/vanpool spaces is calculated based on the total number of parking spaces provided, not on the number of parking spaces required.

Maximum points will be awarded when ridematching services are provided along with preferential parking for car/vanpools.

Plan Guidance: Indicate the number of carpool and vanpool reserved spaces to be provided and where they will be located on the project site. Copy the guidance above into the template to ensure proper implementation.

End of Trip Facilities

Provide showers, lockers, and changing rooms for employees who use active transportation to get to work.

Plan Guidance: Indicate the number of showers, lockers, and changing rooms and where they will be located on the site/building plan.

Elective Non-Infrastructure Strategies

Amenities

An amenity is defined as a featured product or service that is provided to residents/employees to reduce the need to drive to work or to facilitate transit or active transportation use. The amenity must be marketed clearly as such and highly visible at the site.

Micromobility Fleet

Provide e-bikes, e-scooters, or other micromobility devices free of charge to residents/employees for business and personal use. Micromobility devices must be easily accessible to residents/employees. The number of points granted will consider for the size of the fleet relative to the resident/employee population, how bike-friendly the surroundings are, and other implementation details. This strategy must be implemented along with micromobility parking.

Plan Guidance: Describe the micromobility devices that will be available for use by residents/employees, the number of devices, and the location where devices will be stored. Include the location on building/site plan. Indicate if all residents/employees will have access to the devices and how they will reserve/check out devices.

Real-Time Travel Information Screens

Provide displays in key locations in developments that display real-time information about travel options. This can include arrival and departure times of area transit services, the location of nearby micromobility devices, carshare vehicles, and other travel options. Screens must cover three different travel options (for example. real-time bus information, carshare vehicle availability, and e-bike availability) and be located in high-traffic areas (i.e., building lobby, elevator, mail kiosk).

Plan Guidance: Describe the proposed location of the resources, the travel options covered, and any other relevant information, and show the location on building/site plan.

Programs

The programs discussed below include incentives, services, and tools that lead to an increase in alternative transportation usage. These programs are expected to be implemented once the development is occupied. The applicability of these programs to the worksite will depend on the site location, transportation access, and the type of development.

Transportation Subsidy/Incentives Budget

Subsidize alternative travel modes. Examples include providing monthly transit passes to employees/residents, reimbursing a monthly vanpool cost, or paying a monthly bicycle benefit. This strategy requires developing a budget based on a minimum budget per person equal to the monthly cost of a regional NCTD transit pass and expected participation of 35% of employees/residents for tenant improvements and 40% for new developments. The developer is required to spend at least 75 percent of the budget in each 2-year monitoring period and submit receipts to the city as part of the monitoring requirements. Twenty-five percent of the budget may be rolled over to the subsequent periods. The specific value of budget can vary from year to year so long as the total value of incentives offered is equal to or greater than the minimum requirement. This program must be marketed to residential tenants at move-in and to employees at hiring and annually via email, posters, or other methods likely to be seen/read by most or all tenants. Points will be awarded based on the percentage of residents/employees eligible for the subsidy and the expected uptake rate.

Plan Guidance: Include details of program including how the program will be administered. Indicate the total annual budget, describe what percentage of employees/residents will be eligible and expected to participate, how the program will be marketed, and how participation will be monitored.

Ridematching Services

Offer ridematching to employees/residents by setting up and promoting a private network on the city's ridematching site Carlsbad Commuter (available free of charge), developing an internal ridematching program, or utilizing another third-party ridematching service. For non-residential uses, this is ideally offered in conjunction with Preferential Parking for Car/Vanpools.

Plan Guidance: Discuss plans to create and promote a ridematching program.

Guaranteed Ride Home (GRH) Services

Develop and promote an internal guaranteed ride home program available to all adult residents that offers a minimum of three free rides home per year to residents who used sustainable modes to get to work and need to get home in case of an emergency. Non-residential developments may choose to promote SANDAG's GRH service instead.

Plan Guidance: Describe the internal GRH program (who is covered, what type of emergencies, what are the guaranteed ride options, etc.) or to promote SANDAG's program (non-residential only).

Marketing and Outreach

A TDM plan should include a marketing and outreach component to educate commuters about the transportation programs and services available to them and to encourage sustainable travel choices.

Plan Guidance: Include details of marketing and outreach efforts. Examples include:

- *A community website/page that can be used by residents, employees, and visitors to learn about the transportation services and options available when traveling to, from, or within the site*
- *A printed community map that shows area businesses, parks, community centers, transit routes/stops, bike paths/routes, and a scale based on travel time rather than*

- distance and a printed community transportation brochure that explains travel options and provides resources for traveling sustainably*
- *An annual event for residents or employees where they can learn about their travel options and interact with their neighbors and fellow employees, e.g., barbeques, food truck events, and movie nights*
 - *On-going outreach events at the site to educate residents or employees about their travel options and encourage them to commute using sustainable travel modes, such as regularly scheduled lunch and learns*
 - *An annual employee campaign and/or challenge that encourages employees or residents to use sustainable modes*
 - *Offering or reimbursing employees or residents for bicycle commuter classes, such as courses offered by the League of American Bicyclists, the American Bicycling Education Association, or the Bike Coalition of San Diego County.*

Partnerships

Partnerships are an effective way to leverage resources to achieve TDM benefits. Partnerships with neighboring businesses/properties can reduce trip mitigation costs to the developer and partnerships with private vendors can provide products and services that reduce the need to drive alone to the worksite.

Establish and Maintain Partnerships with Area Businesses/Properties

Create and implement TDM cost sharing partnerships with area businesses/properties to address shared trip mitigation resources and efforts. An example of this would be financial participation in a shuttle that serves the closest rail station.

Plan Guidance: Identify partner business(es) or entities and the TDM resource(s) that will be provided through the partnership.

Establish and Maintain Partnerships with Private Vendors

Create and implement partnerships with private vendors that create measurable levels of local service delivery of things such as car-sharing, micro-mobility, dynamic ridesharing, shuttles, and other services as deemed appropriate from above.

Plan Guidance: Work with the TA to define strategies and discuss the ability of the strategy to reduce single-occupancy trips to the site.

Innovation

Any other strategies to reduce single-occupancy trips to the worksite/property will be considered. Strategies that have been implemented successfully at other developments, including other geographies, are encouraged. Proposed strategies must result in a reduction in vehicle trips to the site.

Plan Guidance: Work with the TA to define strategies and discuss the ability of the strategy to reduce single-occupancy trips to the site.

Non-Residential Only

Amenities

Mobile On-site Amenities

Provide access to mobile on-site amenities such as: food trucks, mobile dry cleaning, mobile bike repair services, and mobile hair salons that reduce the need to drive for errands during the workday. At a minimum, mobile amenities must be offered twice a week.

Plan Guidance: Discuss the mobile on-site amenities that will be located at the development and explain how these offerings will reduce trips rather than serve as trip-generators. Discuss discounts available to tenants. Provide a map showing the location of these amenities if applicable and discuss agreements between vendors and schedules.

Employer Programs

Telework Program

Implement a formal telework program that allows eligible employees to work from home at least one day per week. Points will be awarded based on estimated trip reduction calculated by multiplying the expected trip reduction per person with the percentage of employees expected to participate. For example, 40% of employees teleworking one day per week (a 20% trip reduction per employee) would yield an overall estimated trip reduction of 8% and two points. A minimum trip reduction of 5% is required to gain a point.

- 5% trip reduction = 1 point
- 6-10% trip reduction = 2 points
- 11-15% trip reduction = 3 points
- 16-20% trip reduction = 4 points
- 21% trip reduction or more = 5 points

Plan Guidance: Include information about the program, such as the infrastructure and policies that will be available to support teleworking, the anticipated percentage of employees that will be eligible and the anticipated number of days employees can telework per week or month

Flexible/Alternative Work Schedules

Implement a flexible or alternative work schedule program that allows eligible employees to vary their arrival and departure time and/or work a compressed work schedule, such as four 10-hour days per week or 80 hours in nine days every two weeks.

Plan Guidance: Include employee handbook excerpt or written policy as well as information about the program, such as the anticipated percentage of employees that will be eligible and any limits or guidance on the arrangements that are acceptable. One point may be granted for flexible arrival and departure times provided that supporting strategies are offered as well (ridematching, transit subsidies, or similar). One or two points may be granted for alternative/compressed work schedules, depending on the schedule and the percentage of employees eligible to work these schedules.

Alternative Transportation Incentive

Offer cash payments in exchange for employees choosing an alternative transportation mode. This differs from the subsidies described in the transportation subsidy/incentives budget,

because it does not tie the incentive amount to the cost of commuting. It can be offered in addition to transit pass or similar subsidies but is often offered instead as a stand-alone program. It can be offered on a monthly or daily basis and will require verification that participating employees are not driving alone to work. Parking cash out is an example where employees are offered a cash amount in exchange for giving up their parking space.

Plan Guidance: Include details of program including how the program will be administered. Indicate the total annual budget, describe what percentage of the workforce will be eligible to participate, how the program will be marketed and how participation will be monitored.

Commuter Tax Benefits

Employers can offer pre-tax commute benefits to employees. Section 1.132-9 of the IRS code allow employees to use up to an annual limit (\$265 in 2019) per month in pre-tax money to pay for their transit fares, vanpool fares, or parking fees at park and rides. The tax benefit program can be administered in-house or through a payroll service provider. There are several companies that specifically provide transportation benefit payroll services.

Plan Guidance: Include how the program will be implemented and marketed to employees.

Customized Travel Plans

Provide customized travel plans to employees based on their home location, work hours and related factors along with programs and incentives that may be available to them.

Plan Guidance: Identify department/position that will be responsible for implementation and how this will be promoted.

B. Alignment with Local, Regional, and State Plans

Alignment with City Goals and Policies

The TDM Program was designed to support city's goals of being a healthy, sustainable, and multi-modal community for its residents, employees, and visitors. The TDM Program supports and implements policies set out in several important city planning and policy documents as described below.

4.4.1 The General Plan

The **General Plan**, adopted September 22, 2015, is the comprehensive and long-range plan for how the city will achieve its vision and goals for the future. Guided by the **Carlsbad Community Vision**, it outlines the city's approach to managing land use, mobility, open space, noise, public safety, arts and history, economy and business, sustainability, and housing. Two of the key strategies identified in the General Plan are to increase and improve street connectivity and promote livable streets that are walkable and bicycle-friendly.

4.4.2 Livable Streets Guide

The **Mobility Element of the General Plan** seeks to enhance mobility and connectivity of the city's transportation system by integrating transportation and land use planning, promoting **multi-modal** travel, and incorporating TDM strategies. The **Livable Streets Guide (Table 3-1)** describes how the city will plan and design the street system to serve people of all ages using all mobility options. It identifies the preferred attributes of various street types found in Carlsbad.

4.4.3 Climate Action Plan

The **Climate Action Plan (CAP)** lays out a comprehensive, citywide strategy to reduce Carlsbad's greenhouse gas (GHG) emissions and monitor the city's progress toward its GHG reduction targets. It includes measures and actions for Carlsbad to help meet statewide reduction targets to 2035. One of these actions, Measure K-2, specifies that the city will enact a TDM Ordinance to reduce single-occupancy vehicle trips among Carlsbad workers and increase the use of alternative options.

4.4.4 Growth Management Plan/ Local Facilities Management Plans

The City of Carlsbad's **Growth Management Plans** allow for population and employment growth while maintaining the right mix of land uses, preserving open space, and maintaining adequate levels of service for existing infrastructure. The **Local Facilities Management Plans** help ensure the adequate provision of public facilities and improvements concurrent with new development in 25 sub-areas within Carlsbad.

4.4.5 Parking Management Plan

The City of Carlsbad's **Parking Management Plan (PMP)** presents short-, medium-, and long-term strategies to improve the parking systems in the Carlsbad Village, Barrio, and adjacent beach area. TDM and parking management programs often complement each other: parking management strategies can be effective ways of reducing drive-alone trips and TDM strategies have the benefit of reducing demand for parking.

4.4.6 Coastal Mobility Readiness Plan

The goal of the **Coastal Mobility Readiness Plan** is to prepare Carlsbad to adapt to rapid advances in transportation systems technology. The plan considers how the future of autonomous vehicles, shared mobility, parking management, and other emerging technologies will influence transportation along the coast and how the city can achieve a better quality of life for residents, employees, and visitors.

4.4.7 Sustainable Mobility Plan

The Sustainable Mobility Plan introduces a Multimodal Level of Service (MMLOS) model to better manage growth and impacts to city roadway capacity. The MMLOS recognizes TDM strategies as a way to mitigate traffic from increased vehicles trips. New or planned developments that comply with the TDM Ordinance also satisfy the city's MMLOS requirements.

State and Regional Alignment

The TDM Program also reinforces state and regional programs that promote sustainable development and increased mobility options. By considering the entire development process – from design, construction, to operation – the TDM Program incorporates the various building standards and mobility strategies to ensure adequate infrastructure and programs are in place to support multi-modal travel. Many of the recommended TDM strategies, for example, also satisfy LEED or CALGreen building standards.

4.4.8 LEED

Leadership in Energy and Environmental Design (LEED), developed by the US Green Building Council, is the most widely used green building rating system in the world. LEED standards recognize TDM as an effective way to reduce energy consumption and pollution associated with green buildings. TDM strategies can be used to earn credits towards LEED certification.

4.4.9 CALGreen

The **California Green Building Standards Code (CALGreen)** is the first statewide green building code in the US. The purpose of the code is to mitigate the negative environmental impact of buildings by encouraging sustainable construction practices. It specifies mandatory measures for non-residential developments that include TDM accommodations for alternative commute modes.

4.4.10 SANDAG 2021 Regional Plan

Like its predecessor approved in 2015, the **San Diego Association of Governments (SANDAG) 2021 Regional Plan** outlines the region’s transportation investment strategy through 2050. The Plan focuses on 5 Big Moves: Complete Corridors/Multimodal Roads, Transit Leap/Fast and Flexible Transit, Mobility Hubs/Connection Points, Flexible Fleets/First and Last Mile Options, and the Next OS/Enabling Technology. As required by Senate Bill 375, the Plan also includes a Sustainable Communities Strategy, which specifies how the region will meet state-mandated targets for greenhouse gas reductions. In addition, as required by Assembly Bill 805, the Plan includes strategies that provide for mode shift to public transportation, identify disadvantaged communities, and include transportation strategies to reduce pollution exposure in disadvantaged communities.

4.4.11 SANDAG Regional Mobility Hub Strategy

The SANDAG **Regional Mobility Hub Strategy** demonstrates how transportation services, amenities, and supporting technologies can work together to make it easier for communities to access transit and other shared mobility choices. A Mobility Hub Features Catalog and **mobility hub** prototypes have been developed to guide mobility hub implementation.

4.4.12 SANDAG Smart Growth Design Guidelines

SANDAG’s **Smart Growth Design Guidelines** provides guidance on how to employ smart growth principles to design great public places that enhance the quality of life in the San Diego region. It identifies the appropriate strategies for different “place types”, such as buildings, large developments, and streetscapes.

4.4.13 iCommute Regional TDM Program

iCommute is the TDM program for the San Diego region. Operated by SANDAG, it encourages the use of transportation alternatives by providing commuter assistance, employer services, and support for local jurisdictions in the design and implementation of customized TDM programs. The City of Carlsbad’s TDM program will work closely with the iCommute program.

C.TDM Plan Template for Ordinance Projects



TDM Plan Template for Ordinance Projects Instructions

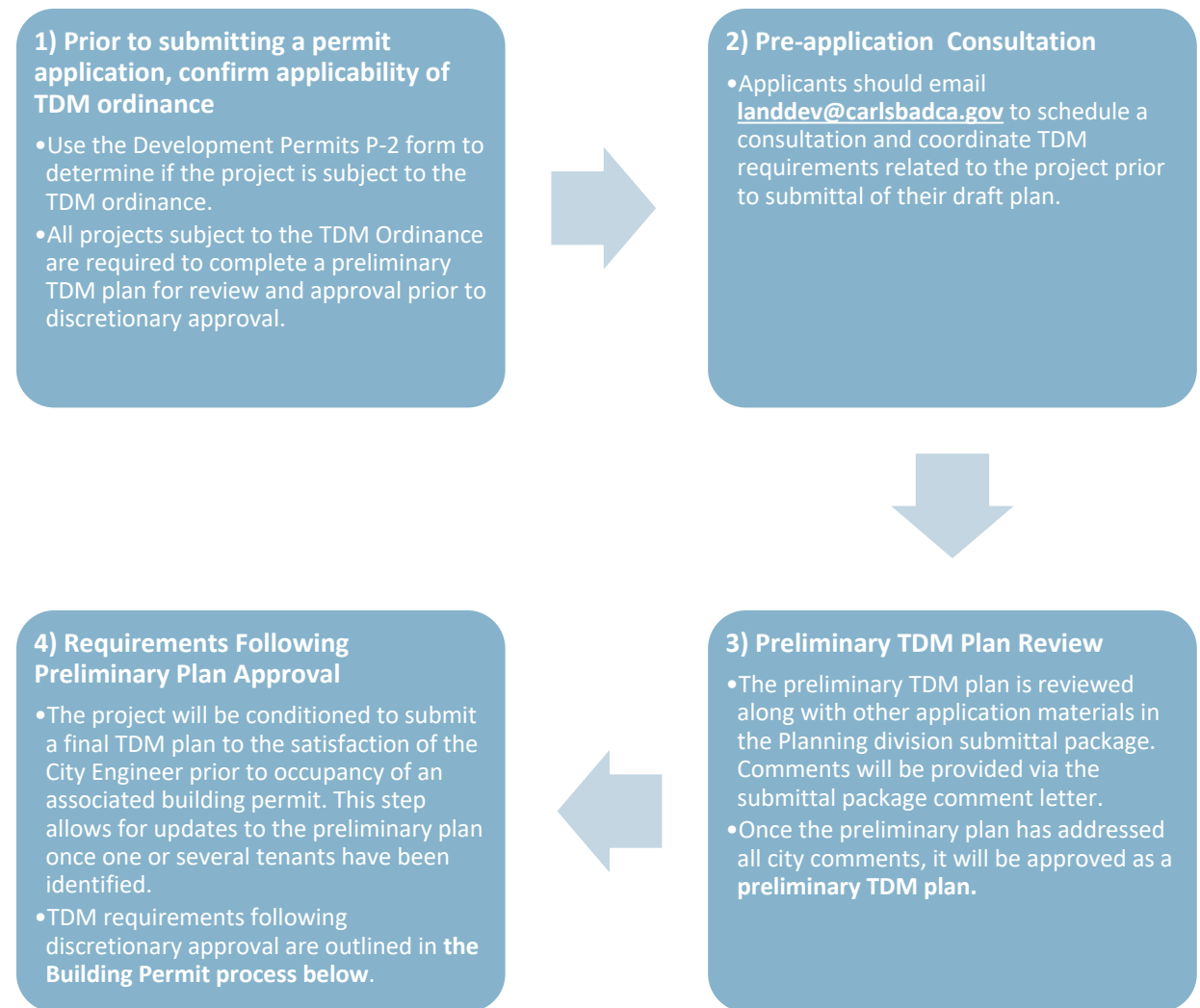
City of Carlsbad
Land Development Engineering
1635 Faraday Ave
Carlsbad, CA 92008

How to Use the Template: Non-residential developments that meet trip generation thresholds specified in the city’s TDM Ordinance must submit a TDM Plan. This template shall be used to prepare a Non-Residential TDM plan compliant with the requirements of the TDM Ordinance.

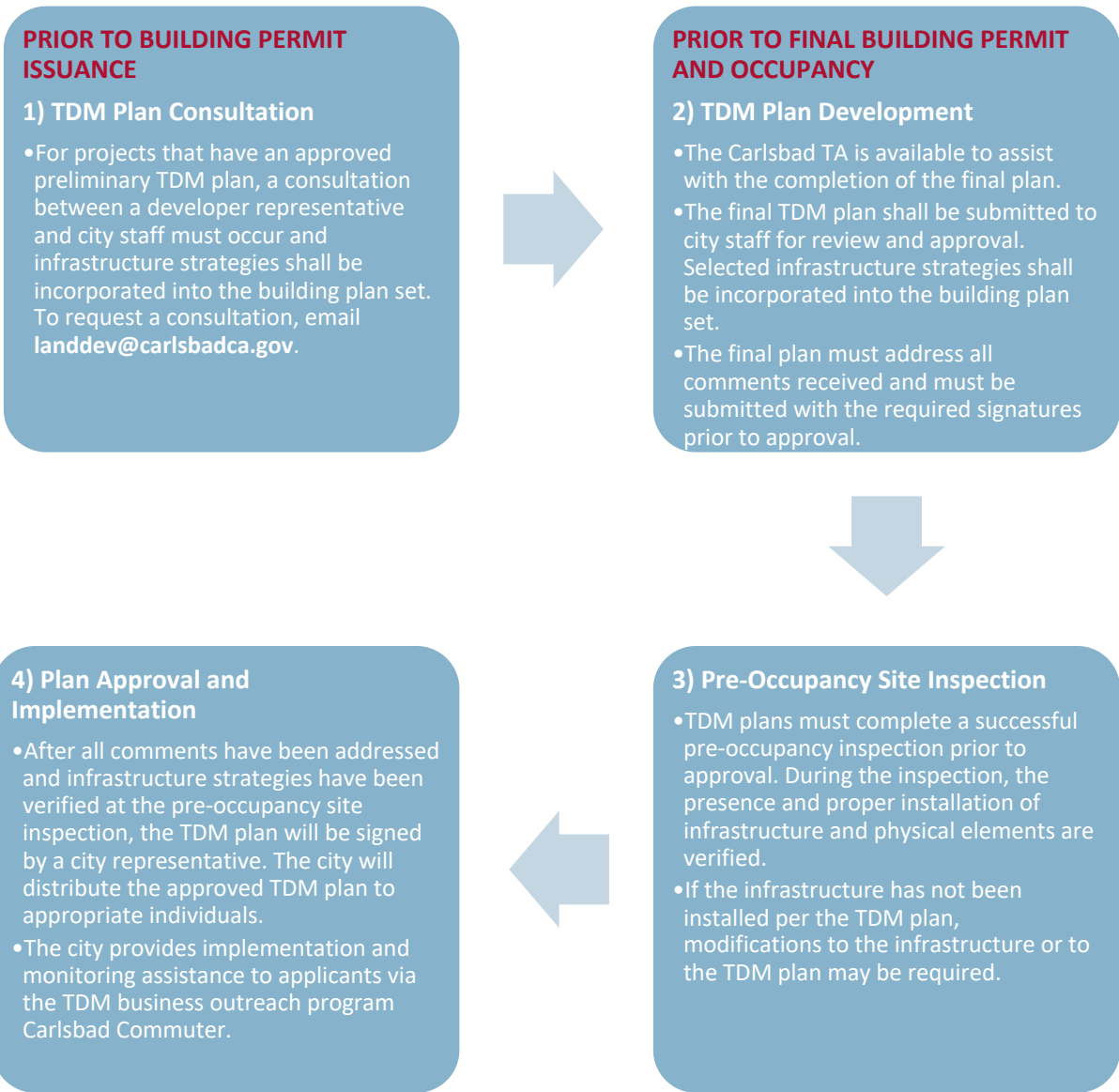
The Carlsbad Transportation Administrator (TA) is available to support developers with TDM Ordinance compliance and completion of your plan. To get started or for questions, please contact landdev@carlsbadca.gov or call 442-339-2750.

TDM Plan Development and Approval Process

Discretionary Permits (if applicable)



Building Permits – Projects with a Preliminary Plan on File



Building Permits – Projects with no Preliminary Plan on File

PRIOR TO BUILDING PERMIT ISSUANCE

1) TDM Plan Consultation

- Prior to issuance of a building permit, all projects subject to the TDM ordinance must complete a consultation with city staff regarding submittal of the TDM plan. To request a consultation, email landdev@carlsbadca.gov.
- In addition, a consultation between the plan preparer and city staff or the Carlsbad TA must occur prior to building permit issuance.
- If the property has an approved TDM plan on file, applicants may choose to sign on to the property's plan, unless a higher tier is required.



2) Infrastructure Selection

- Applicants who develop their own plan must identify infrastructure strategies before building permit issuance and discuss and email them with an early draft plan to the Carlsbad TA for preliminary approval. These infrastructure strategies will need to be incorporated into the building plan set.



4) Pre-Occupancy Site Inspection

- TDM plans must complete a successful pre-occupancy inspection prior to approval. During the inspection, the presence and proper installation of infrastructure and physical elements are verified.
- If the infrastructure has not been installed per the TDM plan, modifications to the infrastructure or to the TDM plan may be required.



PRIOR TO FINAL BUILDING PERMIT AND OCCUPANCY

3) TDM Plan Development

- The Carlsbad TA is available to assist with the completion of the plan.
- Applicants/plan preparers submit a draft of the final plan using the template in Appendix C with supporting documentation to the Carlsbad TA for review and receives feedback at the latest six weeks before occupancy is expected.
- The final plan must address all comments received and must be submitted with the required signatures prior to approval.



5) Plan Approval and Implementation

- After all comments have been addressed and infrastructure strategies have been verified at the pre-occupancy site inspection, the TDM plan will be signed by a city representative. The city will distribute the approved TDM plan to appropriate individuals.
- The city provides implementation and monitoring assistance to applicants via the TDM business outreach program Carlsbad Commuter.

Additional Information

All developments are required to begin to monitor the alternative mode share of commute trips to the site through employee surveys within 12 months of reaching 75 percent occupancy or within 18 months of initial occupancy, whichever occurs first. Developments with multiple buildings or phases are required to conduct employee surveys within 12 months of reaching 75 percent occupancy of the first building or within 18 months of initial occupancy of the first building, whichever occurs first.

For more detailed information please refer to section 2, Non-Residential Developer TDM Plan Guidelines within the TDM Handbook.

TDM Plan for Ordinance Projects

Submittal Date: _____

- Preliminary Plan (Discretionary Review Phase Only)
- Final Plan

SECTION 1: Applicant Profile

Applicant Name: _____
Property Manager Name: _____
Applicant Mailing Address: _____
Number Street Suite
City State Zip Code

Primary Contact: _____ Email: _____
Phone: _____

SECTION 2: Project Information

Project Name: _____
Permit Number: _____
Project Address: _____
Number Street Suite
City State Zip Code

Project Description and Site Map

Please include a description of the project. If the project is a tenant improvement that does not apply to the whole building/site, please include a site map that shows which areas of the site are subject to the improvement.

TDM Plan Tier

Refer to Table 2-1 of the handbook for tier levels based on ADET and development type.

- Tier 1
- Tier 2

Tier 3

Number of Employees

Specify the expected number of employees at this location at move-in and at full capacity.

	<u>Move-In</u>	<u>Full Capacity</u>
Number of Full-Time Employees	_____	_____
Number of Part-Time Employees	_____	_____
Number of Contract Employees	_____	_____
Total Number of Employees	_____	_____

Average Daily Traffic (ADET) Calculations

Refer to Table 2-2 of the handbook for ADET/SF and additional information. The square footage used to calculate the trip generation estimate for tenant improvements is based on the floor area of the improvement, not the square footage of the entire building.

	GFA (SF)	ADET
Office – All Uses		
Restaurant		
Retail		
Industrial		
Warehousing		
Manufacturing		
Other		
Total		

Automobile Parking

Automobile Parking	Existing # of Allocated Spaces*	Proposed # of Allocated Spaces*	Proposed # of New Parking Spaces**
Surface Parking Spaces			
Structured Parking Spaces			

*Allocated spaces are the spaces assigned to the building or suite.

** New parking spaces are those added as part of this project.

Project Schedule

Anticipated Occupancy Date: _____

Project Interim Transportation Coordinator

Developer agrees to provide an Interim Transportation Coordinator responsible for ensuring the infrastructure is developed as agreed upon with the City of Carlsbad, development, and execution of TDM Plan requirements, and transitioning Transportation Coordinator duties to

new owners or property managers upon occupancy using the TC Designation Form in Appendix F.

Provide name, title, email, and phone number. This individual may be the primary contact listed above for the project.

SECTION 3: Existing Conditions & TDM Context

Complete the following section to establish existing conditions and TDM context. Expand boxes as needed.

Existing Transportation Infrastructure Network

Please provide a brief discussion or map that describes transportation options that serve the project site. Include the following items:

- *Pedestrian infrastructure adjacent to the site (e.g., sidewalks, nearby crosswalks, or signalized crossings)*
- *Bike infrastructure by type (e.g., Class I, II, III, or IV) adjacent to the site*
- *Transit or shuttle services serving the site with a stop/station within a 1/4 mile (or a 5-minute walk)*

Project-Specific TDM Infrastructure (Tenant Improvements Only)

*Please provide a brief discussion and site plan describing the onsite TDM infrastructure **currently available**:*

- *Number of public bike racks and approximate location with regards to building entrance*
- *Average utilization of bike racks (in %)*
- *Number secure bike racks (specify whether in bike cage, bike room or bike lockers)*
- *Average utilization of bike racks (in %)*
- *Number of designated carpool/vanpool spaces and location with regards to building entrance*
- *Average utilization of carpool/vanpool spaces (in %)*
- *Any other infrastructure or services available to property tenants that encourage the use of public transit, carpooling, vanpooling, walking, and biking, such as a bike repair station, an onsite shelter or waiting area for buses or shuttles, etc.*

Environmental

In the box below, please provide maps of the relevant topographical and experiential conditions that will influence travel behaviors to the project site. At a minimum, provide the following:

- *A Google map with terrain view and bike lanes showing approximately a 2-mile radius around the site*
- *Photos (or street view screenshot) of the roads adjacent to the property*
- *If relevant, discuss additional environmental aspects that may impact use of active and alternative transportation, such as traffic speeds, pedestrian safety, lighting, etc.)*

Project-Specific and/or Nearby Amenities

Count and report the number of project-specific and neighboring amenities onsite or within a 5-minute walk (1/4 mile) of the project site and provide map.

- *Report the number of amenities or establishments by type. Include number of food establishments, child-care facilities, fitness/healthcare facilities and other relevant services such as dry-cleaning that can impact trip generation.*

Anticipated Workforce and Commute Patterns

The makeup of the existing or anticipated workforce will help shape the approach to TDM for a given site. Include the following:

- *Existing or anticipated typical work hours or shifts*
- *Existing or anticipated percentage of part-time employees*
- *If available, any existing commuting information, such as the percentage of employees using different commute modes and the average commute distance.*

SECTION 4: TDM Strategy Selections

Please reference **section 2 of the handbook for available points and appendix A for a detailed description and guidance for each strategy**. Required strategies add 4 points towards the total required number of points. Tier 3 TDM plans must achieve a minimum of 6 points through infrastructure strategies unless otherwise agreed upon with city staff.

To select strategies for inclusion in the TDM plan, check the box to the left of the strategy, provide information as requested in the box below the strategy, and indicate the points requested. For strategies with a range of points, work with the TA who will assist in determining the appropriate number of points based on the unique context of the site and the proposed project.

Claiming Points for Existing Amenities (Tenant Improvements Only)

If the tenant has access to an existing infrastructure amenity available at the site, the tenant can claim that amenity in their plan unless that amenity does not meet minimum standards or is, on average, fully utilized, such as two carpool spaces that are both occupied on most weekdays. The capacity of an existing infrastructure amenity will be evaluated at the time the strategy is proposed.

Strategies Used to Fulfill CEQA Requirements

Any TDM strategies that will be used to fulfill both TDM Plan and CEQA requirements must be identified in the description and the strategy summary in Section 5. In addition, CEQA documentation related to the strategy must be attached as an appendix to this template.

Scope of Strategies for Tenant Improvements

While physical improvements tend to be tied to the size and scope of the tenant improvement, programmatic improvements are expected to be available to all of the employer's employees at the site.

Required Strategies

Transportation Coordinator

Points: 1

Designate an on-site transportation coordinator responsible for ensuring that infrastructure is maintained, policies and programs are implemented, and amenities and partnerships are maintained as described in the approved TDM Plan. The TC ensures compliance with City of Carlsbad TDM Plan requirements and must attend an introductory meeting and complete a TC training.

Complete the TC Designation Form in Appendix F and add as an appendix to this plan.

Distribute New Hire Transportation Information **Points: 1**
Distribute transportation options information to new employees during the hiring and orientation process.

Citywide TDM Program **Points: 2**
Meet with the citywide TDM programs outreach staff on a regular basis (at least annually) and participate in/promote at least two events held by the citywide TDM program.

(SHELL BUILDINGS AND MULTI-TENANT BUILDINGS ONLY)

TDM in Leases **Points: 1**
Applies to shell buildings and multi-tenant buildings. Plan Guidance: Provide language that will be included in the lease that details the requirements laid out in Section 2, describes for which strategies the tenant(s) will be responsible, and notes that lease agreements will be accompanied by the approved TDM plan. Tenant TC contacts must be provided prior to the pre-occupancy inspection.

Infrastructure Strategies

Secure Bike Parking **Points Requested:**
Secure bike parking must be made available to employees at no cost. Indicate the number of secure, long-term bike parking spaces to be provided, how they will be accessed and where they will be located on the project site (include on building/site plan). Refer to the handbook for the number of spaces required to earn points. Please consult “Essentials of Bike Parking” by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide guidance to the installer. Unapproved types of secure bike parking or poorly installed facilities may not pass inspection.

Public Bike Parking **Points Requested:**
Indicate the number of short-term spaces and the type of bike rack to be provided and include the location on the building/site plan. Refer to the handbook for the number of spaces required to earn points and guidance on installation. Please consult “Essentials of Bike Parking” by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide the type of bike rack and installation guidance to the installer. Unapproved bike rack types or poorly installed racks may not pass inspection.

Bicycle Repair Station

Points Requested:

Describe what items will be included in the bicycle repair station and include the location on the building/site plan.

Micromobility Parking

Points Requested:

Indicate where micromobility parking and charging will be located on the project site. Include location on the building/site plan.

Preferential Parking for Car/Vanpools

Points Requested:

Indicate the number of carpool and vanpool reserved spaces to be provided and where they will be located on the project site (on the building/site plan). Refer to Appendix A of the handbook for guidance on the required number of spaces and copy the guidance into the space below to ensure proper implementation. Maximum points will be awarded when offered in conjunction with ridematching services.

Car Share Parking and Vehicles

Points Requested:

Indicate the number of vehicles and reserved spaces to be provided and where they will be located on the project site (include in building/site plan).

End of Trip Facilities

Points Requested:

Indicate the number of showers, lockers, and changing rooms and where they will be located on the building/site plan.

On-site Amenities

Points Requested:

Discuss the on-site amenities that will be located at the development and explain how these offerings will mitigate trips rather than serve as trip-generators. Discuss discounts available to tenants if applicable. Show the location of the amenities on the building/site plan.

Bicycle and Pedestrian Connections

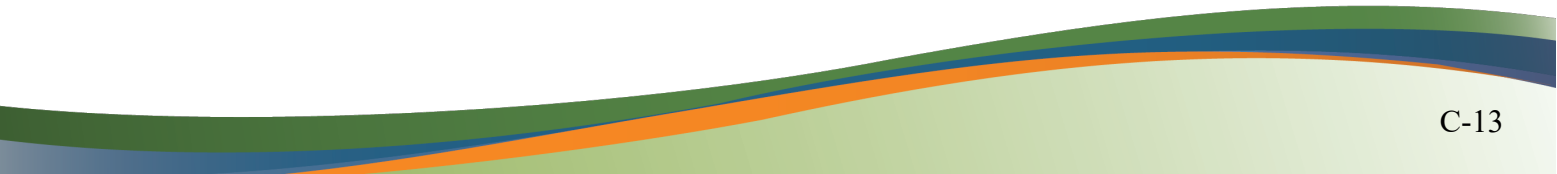
Points Requested:

Provide a map showing proposed pedestrian and bicycle infrastructure and connections to existing facilities and within the site.

Passenger Loading Zone

Points Requested:

Describe location of and denote loading zone on building/site plan.



Innovation (Infrastructure-Based)

Points Requested:

Describe the strategy and discuss how it will lead to reduced single-occupancy vehicle trips to and from the site and include locations on the building/site plan.

Non-Infrastructure Strategies

Non-infrastructure strategies for tenant improvements must be made available to all employees at the worksite, not only those in the improved space.

Amenities

Car Share Vehicles

Points Requested:

Identify the number of car share vehicles that will be provided on-site and if these vehicles will be provided by an existing car share operator or by the employer/property owner. Indicate whether membership will be fully or partially subsidized for employees/tenants. Must be provided in conjunction with car share parking.

Micromobility Fleet

Points Requested:

Describe the micromobility devices (e-bikes, e-scooters, etc.) that will be available for use by employees/tenants, the number of devices, and the location where devices will be stored. Include the location on building/site plan. Indicate if all employees/tenants will have access to the devices and how employees/tenants will reserve/check out devices.

Real-Time Travel Information

Points Requested:

Describe the proposed location of the resources and the real-time travel information made available.

Mobile On-site Amenities

Points Requested:

Discuss the mobile on-site amenities that will be located at the development and explain how these offerings will mitigate trips rather than serve as trip-generators. Discuss discounts available to tenants. Provide a map showing the proposed location of these amenities and discuss agreements between vendors and schedules.

Developer/Employer Programs

Transportation Subsidy/Incentives Budget

Points Requested:

Include details of program including the subsidy that will be offered (such as transit pass subsidy), how the program will be administered. Indicate the total annual budget, describe what percentage of the workforce will be eligible to participate, how the program will be marketed and how participation will be monitored.

Ridematching Services

Points Requested:

Plan Guidance: Discuss plans to create and promote ridematching program.

Guaranteed Ride Home (GRH) Services

Points Requested:

Discuss plans to create an internal GRH program. At a minimum, developer will promote existing services, such as SANDAG's iCommute service.

Marketing and Outreach

Points Requested:

Include details of marketing and outreach efforts.

Employer Programs

Telework Program

Points Requested:

Include information about the program, such as the infrastructure and policies that will be available to support teleworking, the anticipated percentage of employees that will be eligible and any limits or guidance on the number of days employees can telework per week or month. The number of points is tied to the expected number of telework days and associated trip reductions (see handbook for further guidance).

Flexible/Alternative Work Schedules

Points Requested:

Include information about the program, such as the anticipated percentage of employees that will be eligible and any limits or guidance on the arrangements that are acceptable.

Alternative Transportation Incentive

Points Requested:

Include details of program including how the program will be administered. Indicate the total annual budget, describe what percentage of the workforce will be eligible to participate, how the program will be marketed and how participation will be monitored.

Commuter Tax Benefits

Points Requested:

Include how the program will be marketed to employees.

Customized Travel Plans

Points Requested:

Identify department/position that will be responsible for implementation.

Partnerships

Establish and Maintain Partnerships with Area Businesses Points Requested:

Identify partner business(es) or entities and the TDM resource(s) that will be provided through the partnership. Describe how costs will be shared.

Establish and Maintain Partnerships with Private Vendors Points Requested:

Identify partner business(es) or entities and the TDM resource(s) that will be provided through the partnership.

Innovation

Innovation (Non-Infrastructure-Based)

Points Requested:

Describe the strategy and discuss how it will lead to reduced single-occupancy vehicle trips to and from the site.

SECTION 5: Strategy Summary and Site Plan

1. Provide a summary of selected strategies and points requested in this table and mark any strategies that are used as VMT reduction strategies to comply with the California Environmental Quality Act (CEQA). TDM measures used to meet CEQA requirements must remain in perpetuity with the project.
2. Attach a site plan that displays the location of all physical elements of the TDM plan. This plan will be used by city staff to verify all physical elements at the pre-occupancy inspection. The site plan must:
 - a. Include locations and quantities of all infrastructure elements and any physical elements of non-infrastructure strategies (i.e., real-time information screens or transportation kiosks)
 - b. Differentiate between existing and proposed elements and clearly mark the elements for which points are requested
 - c. Be legible and on a sheet no larger than 11” by 17”

Strategy	Points	CEQA	Notes (Admin Use Only)
Secure Bike Parking			
Public Bike Parking			
Bicycle Repair Station			
Micromobility Parking			
Preferential Parking for Car/Vanpools			
Parking Spaces for Carshare Vehicles			
End of Trip Facilities			
On-Site Amenities			
Bicycle and Pedestrian Connections			
Passenger Loading Zone			
Innovation (Infrastructure-Based)			
Carshare Vehicles			
Micromobility Fleet			
Real-Time Travel Information			
Mobile On-Site Amenities			
Transportation Subsidy/Incentives Budget			
Ridematching Services			
Guaranteed Ride Home (GRH) Services			
Marketing and Outreach			
Telework Program			
Flexible/Alternative Work Schedules			
Alternative Transportation Incentive			
Commuter Tax Benefits			
Customized Travel Plans			

Establish and Maintain Partnerships with Area Businesses			
Establish and Maintain Partnerships with Private Vendors			
Innovation (Non-Infrastructure-Based)			
Total Points			

SECTION 6: Transfer of Ownership (New Developments Only)

By signing below, owner agrees to inform the city of a sale and provide contact information for a new owner to ensure that the plan will continue throughout the life of the project.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name	Signature	Date
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Organization	Email	Phone Number
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SECTION 7: Monitoring

By signing below, applicant agrees to distribute commute surveys to employees every two years following the baseline survey conducted within 12 months of occupancy reaching 75 percent or within 18 months of initial occupancy, whichever occurs first. Alternatively, applicant may provide a copy of the signed lease that stipulates that the employer tenant(s) will administer employee commute surveys on the same schedule.

In addition, applicant acknowledges the interim and final alternative mode share goals, listed below, that the development is required to achieve. Should the goals not be achieved, transportation coordinator agrees to work with the citywide program to replace ineffective measures or identify additional measures suitable for implementation at the project site.

Period in which Reporting Falls	Alternative Mode Share Goal	
	New Developments	Existing Buildings/Tenant Improvements
Present till 2025	25%	24%
2025 - 2029	30%	26%
2030 - 2034	35%	28%
2035 on	40%	30%

SECTION 8: Signatures

By signing below, applicant and transportation coordinator certify that the information provided in this document is complete and accurate. By signing this document, the transportation coordinator is committing to providing the strategies identified in this document and to participate in monitoring activities described in Section 7.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of Building Owner:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of (Interim or Final) Transportation Coordinator:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of City of Carlsbad Representative:

Printed Name	Signature	Date
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(ADMIN USE ONLY)

Estimated Occupancy Date: _____

For TDM in Leases Strategy, tenant TC contacts have been provided: Y/N

D. TDM Plan Template for Mobility Element Projects



TDM Plan Template for Mobility Element Projects Instructions

City of Carlsbad
Land Development Engineering
1635 Faraday Ave
Carlsbad, CA 92008

How to Use the Template: This template shall be used to prepare a Mobility Element TDM plan in conformance with the requirements of the General Plan Mobility Element.

The Carlsbad Transportation Administrator (TA) is available to support developers with TDM plan development. To get started or for questions, please contact landdev@carlsbadca.gov or call 442-339-2750.

TDM Plan Development and Approval Process

Discretionary Permits (if applicable)

1) Prior to submitting a permit application, confirm applicability of General Plan Mobility Element Policy 3-P.11:

- Use the Development Permits P-2 form to determine if the project is subject to the Mobility Element Policy.
- All projects subject to the Mobility Element Policy are required complete a preliminary TDM plan for review and approval prior to discretionary approval.



2) Pre-application consultation:

- Applicants should email landdev@carlsbadca.gov to schedule a consultation and coordinate TDM requirements related to the project prior to submittal of their draft plan.



4) Requirements Following Preliminary Plan Approval:

- The project will be conditioned to submit a final TDM plan to the satisfaction of the City Engineer prior to occupancy of an associated building permit. This step allows for updates to the preliminary plan once one or several tenants have been identified.
- TDM requirements following discretionary approval are outlined in the Building Permit process below.



3) Preliminary TDM Plan Review:

- The preliminary TDM plan is reviewed along with other application materials in the Planning division submittal package. Comments will be provided via the submittal package comment letter.
- Once the preliminary plan has addressed all city comments, it will be approved as a **preliminary TDM plan**.

Building Permits – Projects with a Preliminary Plan on File

PRIOR TO BUILDING PERMIT ISSUANCE

1) TDM Plan Consultation

- For projects that have an approved preliminary TDM plan, a consultation between a developer representative and city staff must occur and infrastructure strategies shall be incorporated into the building plan set. To request a consultation, email landdev@carlsbadca.gov.



2) TDM Plan Development

- The Carlsbad TA is available to assist with the completion of the final plan.
- The final TDM plan shall be submitted to city staff for review and approval. Selected infrastructure strategies shall be incorporated into the building plan set.
- The final plan must address all comments received and must be submitted with the required signatures prior to approval.



4) Plan Approval and Implementation

- After all comments have been addressed and infrastructure strategies have been verified at the pre-occupancy site inspection, the TDM plan will be signed by a city representative. The city will distribute the approved TDM plan to appropriate individuals.
- Please note that the city provides implementation and monitoring assistance to applicants via the TDM business outreach program Carlsbad Commuter.

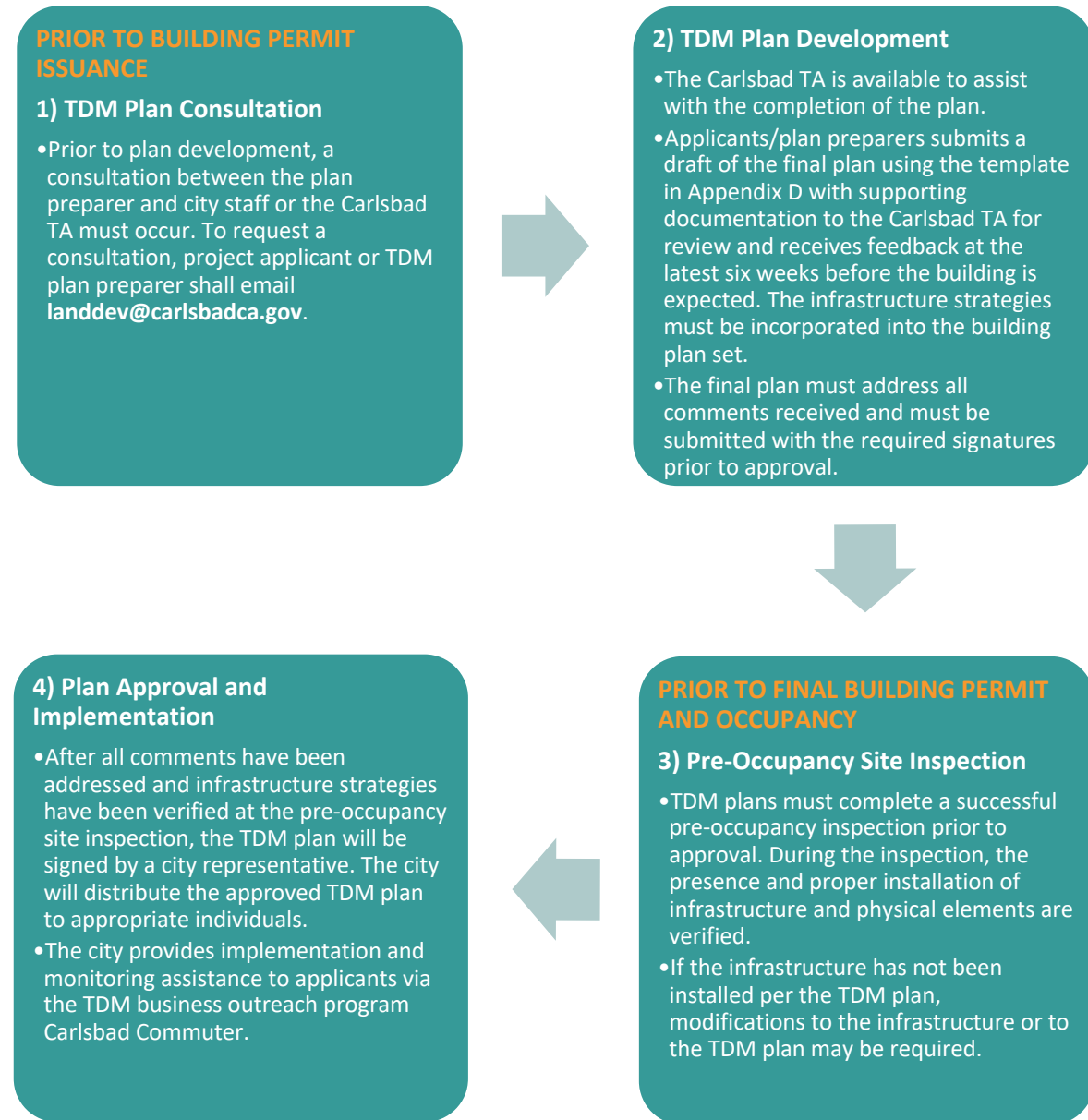


PRIOR TO FINAL BUILDING PERMIT AND OCCUPANCY

3) Pre-Occupancy Site Inspection

- TDM plans must complete a successful pre-occupancy inspection prior to approval. During the inspection, the presence and proper installation of infrastructure and physical elements are verified.
- If the infrastructure has not been installed per the TDM plan, modifications to the infrastructure or to the TDM plan may be required.

Building Permits – Projects with no Preliminary Plan on File



Additional Information

Developments are subject to periodic reporting requirements as determined by the City of Carlsbad.

For more detailed information please refer to Section 3: Mobility Element TDM Plan Requirements of the TDM Handbook.

TDM Plan for Mobility Element Projects

Submittal Date: _____

- Preliminary Plan (Discretionary Review Phase Only)
- Final Plan

SECTION 1: Applicant Profile

Applicant Name: _____
Property Manager
Name: _____
Applicant Mailing
Address: _____
Number Street Suite
City State Zip Code

Primary Contact: _____ Email: _____
Phone: _____

SECTION 2: Project Information

Project Name: _____
Permit Number: _____
Project Address: _____
Number Street Suite
City State Zip Code

Project Description

Please include a brief description of the project.

Non-Residential: Gross Square Feet _____

Residential: Number of Dwelling Units: _____

TDM Plan Tier

Refer to Table 3-2 of the handbook for tier levels based on ADET and development type.

- Tier 1
- Tier 2
- Tier 3

Automobile Parking

Automobile Parking	Existing # of Allocated Spaces*	Proposed # of Allocated Spaces*	Proposed # of New Parking Spaces**
Surface Parking Spaces			
Structured Parking Spaces			

*Allocated spaces are the spaces assigned to the building or suite.

** New parking spaces are those added as part of this project.

Project Schedule

Anticipated Occupancy Date: _____

Project Interim Transportation Coordinator

- Developer agrees to provide an Interim Transportation Coordinator responsible for ensuring the infrastructure is developed as agreed upon with the City of Carlsbad, development, and execution of TDM Plan requirements, and transitioning Transportation Coordinator duties to new owners or property managers upon occupancy using the TC Designation Form.

Provide name, title, and contact information. This individual may be the primary contact listed above for the project.

SECTION 3: Existing Conditions & TDM Context

Complete the following section to establish existing conditions and TDM context.

Existing Transportation Infrastructure Network

Please provide a brief discussion or map that describes the alternative transportation infrastructure available that serves the project site. Include the following items:

- *Pedestrian infrastructure adjacent to the side (e.g., sidewalks, nearby crosswalks, or signalized crossings)*
- *Bike infrastructure by type (e.g., Class I, II, III, or IV) adjacent to the site*
- *Transit or shuttle services serving the site with a stop/station within a ¼ mile (or a 5-minute walk)*

Environmental

In the box below, please provide maps of the relevant topographical and experiential conditions that will influence travel behaviors to the project site. At a minimum, provide the following:

- *A Google map with terrain view and bike lanes showing approximately a 2-mile radius around the site*
- *Photos (or street view screenshot) of the roads adjacent to the property*
- *If relevant, discuss additional environmental aspects that may impact use of active and alternative transportation, such as traffic speeds, pedestrian safety, lighting, etc.)*

Project-Specific and/or Nearby Amenities

Count and report the number of project-specific and neighboring amenities onsite or within a 5-minute walk (1/4 mile) of the project site and provide map.

- *Report the number of amenities or establishments by type. Include number of food establishments, child-care facilities, fitness/healthcare facilities and other relevant services such as dry-cleaning that can impact trip generation.*

SECTION 4: TDM Strategy Selections

The applicant will work with the TA to determine both infrastructure strategies applicable to the site and the appropriate placement of TDM infrastructure.

Please reference **section 3 of the handbook for available points and appendix A for a detailed description and guidance for each strategy**. Tier 1 plans are required to gain three points (one required plus two electives), Tier 2 plans five points (one required and four electives) and Tier 3 plans seven points (one required and six electives).

Check the box to the left of the strategy to include it in the plan. Provide information as requested in the box below the strategy and indicate the points requested for the strategy, using the handbook as a guide. For strategies with a range of points, work with the TA who will assist in determining the appropriate number of points based on the unique context of the site and the proposed project. Refer to the Carlsbad TDM Handbook, Appendix A for details about each strategy.

Strategies Used to Fulfill CEQA Requirements

Any TDM strategies that will be used to fulfill TDM Plan and CEQA requirements must be identified in the description and the strategy summary in Section 5. In addition, CEQA documentation related to the strategy must be attached as an appendix to this template.

Required Strategy

Transportation Coordinator

Points: 1

Designate an on-site transportation coordinator responsible for ensuring that infrastructure is maintained, policies and programs are implemented, and amenities and partnerships are maintained as described in the approved TDM. The TC ensures compliance with City of Carlsbad TDM Plan requirements and must attend an introductory meeting and complete a TC training. *Complete the TC Designation Form in Appendix F and add as an appendix to this plan.*

Elective Infrastructure Strategies

Secure Bike Parking

Points Requested:

Secure bike parking must be made available to residents at no cost. Indicate the number of secure, long-term bike parking spaces to be provided, how they will be accessed and where they will be located on the project site (include on building/site plan). Refer to the handbook for the number of spaces required to earn points. Please consult "Essentials of Bike Parking" by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide guidance to the installer.

Public Bike Parking

Points Requested:

Indicate the number of short-term spaces available to visitors and the type of bike rack to be provided and include the location on the building/site plan. Refer to the handbook for the number of spaces required to earn points and guidance on installation. Please consult “Essentials of Bike Parking” by the Association for Pedestrian and Bicycle Professionals for approved types of bike parking and installation guidance and provide the type of bike rack and installation guidance to the installer. Unapproved bike rack types or poorly installed racks may not pass inspection.

Bicycle Repair Station

Points Requested:

Describe what items will be included in the bicycle repair station and include the location on the building/site plan.

Micromobility Parking

Points Requested:

Indicate where micromobility parking and charging will be located on the project site. Include location on the building/site plan.

Car Share Parking and Vehicles

Points Requested:

Indicate the number of car share vehicles and reserved spaces to be provided and where they will be located on the project site (include in building/site plan).

On-site Amenities

Points Requested:

Discuss the on-site amenities that will be located at the development and explain how these offerings will mitigate trips rather than serve as trip-generators. Discuss discounts available to tenants if applicable. Show the location of the amenities on the building/site plan.

Bicycle and Pedestrian Connections

Points Requested:

Provide a map showing proposed pedestrian and bicycle infrastructure and connections to existing facilities and within the site.

Passenger Loading Zone

Points Requested:

Describe location of and denote loading zone on building/site plan.

Innovation (Infrastructure-Based)

Points Requested:

Describe the strategy and discuss how it will lead to reduced single-occupancy vehicle trips to and from the site and include locations on the building/site plan.

Residential Only

Mixed-Use Component

Points Requested:

Plan Guidance: Discuss the non-residential uses that will be located at the development and explain how these offerings will mitigate trips rather than serve as trip-generators. Discuss discounts available to tenants if applicable. Provide a map showing the location of these amenities.

Delivery-Supportive Amenities

Points Requested:

Describe the type and location of the storage being provided and how residents will access their packages (automated locker system, storage room managed by onsite staff, etc.).

Non-Residential Only

Preferential Parking for Car/Vanpools

Points Requested:

Indicate the number of carpool and vanpool reserved spaces to be provided and where they will be located on the project site (on the building/site plan). Refer to Appendix A of the handbook for guidance on the required number of spaces and copy the guidance into the space below to ensure proper implementation. Maximum points will be awarded when offered in conjunction with ridematching services.

End of Trip Facilities

Points Requested:

Indicate the number of showers, lockers, and changing rooms and where they will be located on the building/site plan.

SECTION 5: Strategy Summary

1. Provide a summary of selected strategies and points requested in this table and mark any strategies that are used as VMT reduction strategies to comply with the California Environmental Quality Act (CEQA). TDM measures used to meet CEQA requirements must remain in perpetuity with the project.
2. Attach a site plan that displays the location of all physical elements of the TDM plan. This plan will be used by city staff to verify all physical elements at the pre-occupancy inspection. The site plan must:
 - a. Include locations and quantities of all infrastructure elements.
 - b. Differentiate between existing and proposed elements and clearly mark the elements for which points are requested.
 - c. Be legible and no larger than 11” by 17”.

Strategy	Points	CEQA	Notes (Admin Use Only)
Secure Bike Parking			
Public Bike Parking			
Bicycle Repair Station			
Micromobility Parking			
Car Share Parking and Vehicles			
Mixed-Use Component			
On-Site Amenities			
Bicycle and Pedestrian Connections			
Passenger Loading Zone			
Innovation (Infrastructure-Based)			
Mixed-Use Component			
Delivery-Supportive Amenities			
Preferential Parking for Car/Vanpool			
End of Trip Facilities			
Total Points			

SECTION 6: Transfer of Ownership

By signing below, developer agrees to inform the city of a sale and provide contact information for a new owner to ensure that the plan will continue throughout the life of the project.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name	Signature	Date
Organization	Email	Phone Number

SECTION 7: Monitoring

By signing below, applicant agrees to provide regular status reports in compliance with the monitoring requirements per Section 3.6 of the TDM Handbook.

SECTION 8: Signatures

By signing below, applicant and transportation coordinator certify that the information provided in this document is complete and accurate. By signing this document, the transportation coordinator is committing to providing the strategies identified in this document and to participate in monitoring activities described in Section 3.6 of the Carlsbad TDM Handbook.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of Building Owner:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of (Interim or Final) Transportation Coordinator:

Printed Name	Signature	Date
Organization	Email	Phone Number

Name and Signature of City of Carlsbad Representative:

Printed Name	Signature	Date
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(ADMIN USE ONLY)

Estimated Occupancy Date: _____

E. Glossary of Terms

Term	Definition
Alternative Mode Share	All modes of transportation that do not include single-occupancy vehicle trips, including transit, walking, biking, ridesharing, and others.
Alternative Mode Share Goal	The city’s Climate Action Plan establishes the goal of achieving an additional 10 percent alternative mode use, for an overall 32 percent alternative mode use, by workers employed in Carlsbad by 2035. To meet this goal, new non-residential projects subject to the TDM ordinance are required to achieve a 40 percent alternative mode share and existing non-residential developments must meet a 30 percent alternative mode share.
Bikeshare	A shared mobility service that offers convenient, on-demand access to bikes for short-term use. This is an important first/last mile option as it connects commuters to and from a transit station.
Build-to-Spec	A building that is a speculative venture for the builder. The developer has the intention of selling at a profit or leasing the building but has not identified the buyer/lessee.
Build-to-Suit	A commercial building in which the developer specifically builds to meet the design and physical specifications of the tenant.
California Environmental Quality Act (CEQA)	A state of California statute that requires local agencies to identify significant environmental impacts of their actions and avoid or mitigate those impacts, if feasible.
Carpool	An arrangement between a group of (2-5) people who live and work near each other to commute to work together in a single vehicle. Dynamic ridesharing services match drivers with passengers who are traveling in the same direction.
Carshare	A shared mobility service that provides vehicles for rent to members for short periods of time. It is typically provided by an employer or property manager as an amenity for employees who typically do not have access to a car.
Climate Action Plan	The Climate Action Plan (CAP) is designed to reduce Carlsbad’s greenhouse gas (GHG) emissions and streamline environmental review of future development projects in the city
Commuter Survey	A paper or electronic survey that includes questions about commuter behavior, preferences, motivations, and barriers to establish and monitor mode share at a work site.
Conditions of Approval	Conditions of approval are requirements that need to be met to receive approval on a discretionary project.
Development	Construction, re-construction, re-model, or alteration of the size of any building structure, or area of occupancy, requiring a development permit; any grading activities requiring a development permit; change in the density or intensity of use of land requiring a development permit.

Development Permit	Any permit approval or entitlement issued pursuant to Title 11, 15, 18, 20 or 21 of the City of Carlsbad Municipal Code.
Employee Trips	The number of average daily trips made by employees to their designated worksite within Carlsbad.
First/Last Mile	First/last mile refers to the first and last connections to and from a transit stop or station and is typically by walking, biking, or riding a bus to a rail station. Transit riders may face problems with making the first and last legs of their transit trip if there are inadequate bus service coverage or unsafe road conditions for biking or walking.
Flexible Curb Space	Curb space designated for transit, shared mobility, and passenger loading. Restrictions on types of uses during certain times of day help balance street demand as they change throughout the day.
Good Faith Effort (GFE)	A business that does not meet its mode share target may still comply with the TDM Ordinance by demonstrating a good faith effort by submitting all the required documents (i.e., Developer Checklist and TDM Plan) and consulting with the Carlsbad TA to develop a robust TDM Plan at their worksite.
Greenhouse Gas (GHG)	Gases that trap heat in the atmosphere. Principal GHGs include carbon-dioxide (CO ₂), methane (CH ₄), nitrous oxide (N ₂ O), hydrofluorocarbons (HFCs), perfluorocarbons (PFCs), and sulfur hexafluoride (SF ₆).
High Occupancy Vehicle (HOV)	A HOV vehicle is one carrying more than one passenger, such as buses, carpools, and vanpools. Providing dedicated priority parking for HOV vehicles promotes ridesharing and reduces the number of vehicles arriving to the worksite.
Infrastructure TDM Improvements	TDM strategies that are incorporated into the facility(ies) and or site design. Examples include designated carpool/vanpool parking, secure bicycle parking, and public bicycle parking.
Mobility Hub	Mobility hubs are places of connectivity where different modes of travel – walking, biking, transit, and shared mobility – converge and where there is a concentration of employment, housing, shopping, and/or recreation. They provide an integrated suite of mobility services, amenities, and technologies to bridge the distance between high-frequency transit and an individual’s origin or destination.
Mode Share	Means percentage of commuters who use different modes of transportation, such as drive-alone, transit, bike, walking, etc.

Mode Share Target	The mode share target is a goal established by the city for work sites. A target mode share of 40% means that 40% of individuals drive alone to work during AM and PM peak periods. The remaining 60% of individuals use alternative travel modes (e.g., vanpool, carpool, biking) to commute to work.
Multimodal	Multimodal refers to multiple modes or ways of travel, such as walking, biking, riding transit or carpooling. Typically, multimodal is used in reference to street design or commuter benefits programs, designed to encourage people to use alternatives to the most common mode of travel, driving alone.
Non-Infrastructure Strategies	TDM strategies such as policies, programs and partnerships that are implemented once the development is occupied. Examples include ridematching programs, transit subsidies, and marketing and promotion of transportation options.
Non-Residential Development	Non-residential or commercial development includes the following land uses: industrial, retail, hotel, office, manufacturing, and mixed-use.
Preliminary Plan	A preliminary plan is created during the discretionary permit phase. The project will be conditioned to submit a final TDM plan to the satisfaction of the City Engineer prior to occupancy of an associated building permit.
Ridematching	Ridematching is a service that connects drivers and riders who live and work nearby to reduce the number of SOV trips. It may be administered by the employer, a TMA/TMO, the Carlsbad TA, or a regional TDM service provider.
Rideshare	Any non-SOV trip including carpool, vanpool, or public transit.
Shared Parking	Shared parking is a situation in which two or more complementary land uses share a set of parking spaces. This can be due to different peak demands, such as morning versus evening or weekday versus weekend. For example, an office complex and restaurant may have complementary uses the restaurant experiences peak patronage in the evening, when employees are off and are heading home.
Shell Building	Spec building with no pre-defined use and/or occupancy.
Single Occupancy Vehicle (SOV) trips	Means one occupant per vehicle. SOV trips can be used interchangeably with drive-alone or solo driving trips.
TDM Menu of Options	A list of TDM strategies that may be implemented at a work site.
Transportation Administrator (TA)	The Carlsbad Transportation Administrator (Carlsbad TA) assists project applicant and businesses in meeting the mandatory and suggested requirements of the TDM Ordinance and voluntary TDM Business Program. The Carlsbad TA is available for consultation prior to and during the compliance process, including help with worksite analyses, preparing TDM Plans, conducting commute surveys, and implementing successful TDM programs to meet mode share targets.

<p>Transportation Coordinator (TC)</p>	<p>A TC is the primary contact for employees as it relates to transportation-related programs and services, such as transit options, available rideshare and active transportation amenities, and commuter programs and events. TCs are responsible for preparing and implementing the approved TDM. TCs are required to attend an introductory training.</p>
<p>Transportation Demand Management (TDM)</p>	<p>Strategies, policies, and programs that reduce demand on roadway infrastructure by reducing single-occupancy vehicle trips. TDM programs include measures that work to reduce single occupancy vehicle (SOV) trips, increase vehicle occupancy, and shift travel to other modes or to non-peak travel periods. This is achieved through employer actions, financial incentives, alternative work arrangements, or local infrastructure and land use policy that constrains parking supply, densifies uses, and provides a convenient suite of transportation options including walking, bicycling, transit, and rideshare. Transportation Demand Management (TDM) means strategies, policies, and programs that reduce demand on roadway infrastructure by reducing single-occupancy vehicle trips.</p>
<p>Transportation Demand Management (TDM) Ordinance</p>	<p>City of Carlsbad ordinance that fulfills measure K-2 of the Climate Action Plan to reduce single-occupancy vehicle trips and increase alternative mode share among Carlsbad workers to meet 2035 GHG reduction targets. Non-residential development projects where employees produce a minimum of 110 average daily employee trips (ADET) are subject to the ordinance and must submit a TDM plan.</p>
<p>Transportation Demand Management (TDM) Plan</p>	<p>Strategies and investments to reduce SOV mode share and VMT tailored to a specific worksite/property, including facilities improvements, programs, incentives/disincentives, education, marketing, and outreach.</p>
<p>Unbundling Parking</p>	<p>Lease or sell all parking spaces separately from the rental or purchase fee for residential units or commercial space.</p>
<p>Vanpool</p>	<p>Vanpools are a form of rideshare in which five or more individuals commute to work using a single vehicle. The vehicle may be owned by the individuals or leased from an employer or third-party vendor.</p>

F.TC Designation Form

Transportation Coordinator Designation Form Instructions

Transportation Demand Management (TDM) Plan

Your organization is required to implement and monitor a TDM plan that was approved as part of the City of Carlsbad's development approval process. More information about the TDM plan requirements can be found in the Carlsbad TDM Handbook.

Transportation Coordinator (TC) Duties

The transportation coordinator is responsible for the implementation and compliance monitoring of the TDM plan on file with the City of Carlsbad. Implementation duties include:

- Attending an introductory TC meeting and completing a TC training
- Ensuring that all strategies selected in the approved TDM plan are available to employees/residents, are being maintained regularly, and are being promoted regularly to employees/residents
- Distributing transportation options information to new employees/residents
- Coordinating with the city's business outreach TDM program (Carlsbad Commuter), including attending at least one event or meeting and participating in/promoting at least two citywide TDM events per year.
- Administering a city-provided or city-approved commute survey to employees and submitting a TDM status report to the City of Carlsbad at the frequency identified in the TDM plan.

Form Instructions

This form will become an appendix to your approved TDM plan. Complete the form, including the required signatures and the appendix number on the cover sheet and add it to your approved TDM plan. Submit the TDM plan with the new appendix but excluding this instruction page via email to landdev@carlsbadca.gov or in person at the Engineering Counter located at 1635 Faraday Ave., Carlsbad, CA 92008.

For information regarding the TDM plan requirements, TC duties, or assistance with completing this form, please contact landdev@carlsbadca.gov or call 442-339-2750.

Transportation Coordinator Designation Form

Company Name: _____

Worksite/Property Address: _____

Company Phone Number: _____

TDM Plan Number: _____

Transportation Coordinator (TC): _____

Title:

Company name: _____

Email: _____

Phone Number: _____

Percent of Time Dedicated to TC Duties: _____

Instructions for the TC: Review and check the following requirements.

- I have received and reviewed my company's/property's TDM plan
- I fully understand the implementation and compliance duties
- I commit to implementing the TDM plan commitments as described in the plan. If any of the approved strategies cease to be available or appropriate at my worksite, I will contact the City of Carlsbad to see whether a TDM plan amendment is needed.

Name and Signature of Transportation Coordinator:

Printed Name and Title	Signature	Date
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Instructions for the supervisor of the TC: Review the duties described in the instructions. Indicate your approval of the time commitment by signing below.

- I have received and reviewed my company's/property's TDM plan
- I commit to filing a new transportation coordinator form within 60 days of designating a new TC.

Name and Signature of TC Supervisor:

Printed Name	Signature	Date
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Organization	Email	Phone Number
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Note: If the TC changes, please inform the city by submitting a new TC Designation Form.

G. Transportation Demand Management (TDM) Plan Acknowledgment Form

Transportation Demand Management (TDM) Plan Acknowledgment Form Instructions

TDM Plan Requirement and Form Purpose

Shell buildings and multi-tenant buildings subject to the City of Carlsbad TDM ordinance must establish requirements in lease agreements that require tenants to implement and promote the strategies detailed in the approved TDM plan and comply with the monitoring requirements, such as distributing an employee commute survey and achieving required response rates. Lease agreements must include a copy of the TDM plan and specify which TDM plan commitments must be implemented by the tenant. Tenants applying for a building permit triggering the same or lower tier TDM plan requirement as the property have the option to choose the property's TDM plan or create their own. Tenants who choose the property's TDM plan must complete and sign this **TDM Plan Acknowledgment Form prior to permit issuance**. The tenant is required to have a representative to serve as the Transportation Coordinator (TC) and provide updated TC contact information to the city.

Tenants that trigger a higher tier level than that of the property's TDM plan must create their own TDM plan for city approval.

Form Instructions

Complete the form, including the required signatures and submit the form to landdev@carlsbadca.gov or in person at the Engineering Counter located at 1635 Faraday Ave., Carlsbad, CA 92008.

For information regarding the TDM plan requirements or assistance with completing this form, please contact landdev@carlsbadca.gov or call 442-339-2750.

TDM Plan Acknowledgment Form

TDM Plan Number: _____

Building Permit Number: _____

Company Name: _____

Worksite/Property Address: _____

Company Phone Number: _____

Transportation Coordinator (TC): _____

Title: _____

Email: _____

Phone Number: _____

By signing this document, the following is acknowledged:

- This property is subject to the city's TDM Ordinance.
- A copy of the TDM Plan that applies to this project was received and reviewed.
- The tenant is responsible for implementation of the TDM Plan, including monitoring and surveying, and is subject to enforcement actions for non-compliance.

Signature of Transportation Coordinator:

Signature

Date