

Summary

This Report establishes a conceptual framework for thinking about transit-oriented development in potential light rail stations in Seattle. It also highlights lessons learned by other cities that have had experience with transit-oriented development in station areas. The illustrations on the following page show some transit-oriented development concepts that could be implemented in Seattle.

Important to the initial phase of Seattle's Station Area Planning effort is preparing recommendations for station area development strategies during 1999. The building blocks of this work include:

- Case Studies of Transit-Oriented Development;
- Existing Conditions: Development Opportunities and Constraints;
- Market Conditions;
- Neighborhood Plan Review and Stakeholder Interviews;
- City Council Perspectives;
- Perspectives of the Development Community;
- Potential Development Strategies for Station Areas; and
- Market Forecasts.

CASE STUDIES OF TRANSIT-ORIENTED DEVELOPMENT

The BART system, built in the San Francisco Bay Area in the 1960s, was the first regional rail system constructed in the U.S. in more than 50 years. Since then, urban rail systems have been completed in 10 cities on the West Coast and in Vancouver, B.C. These cities have had varying levels of success in attracting transit-oriented development (TOD) around rail stations. Seattle can learn from these experiences, taking advantage of opportunities presented and avoiding the mistakes made elsewhere.

To understand what tools work best to encourage transit-oriented development, case studies of 12 representative transit-oriented development projects throughout North America were

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Throw page – Transit-oriented development concepts for Seattle graphic

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prepared. Lessons from these case studies and the implications for Seattle are summarized in this Report and presented in more detail in *Case Studies of Transit-Oriented Development*. These lessons will help evaluate potential public actions that could be taken by the City to encourage transit-oriented development in station areas.

The 12 case studies were selected because they represent comparable light rail station types and/or physical settings or because certain types of implementation tools were used to encourage transit-oriented development. In looking for comparable examples, specific station area characteristics were evaluated: whether the station is underground, at-grade or elevated; how many people use the station; the surrounding urban form and land uses; and what other transportation connections are provided. The case studies provide valuable insights that will help the City ensure that recommended development strategies meet the City's goals, further the neighborhoods' visions, and avoid mistakes that have limited transit-oriented development elsewhere.

Findings

The analysis of the case studies leads to the following main findings:

- *Station Area Planning.* All types of station areas benefit, but the greatest results come when Station Area Planning is carried out through comprehensive station area strategies that utilize a combination of zoning, public improvements, development financing packages, and effective marketing programs. These strategies must articulate a long-range vision, yet be flexible enough to respond to changes in the real estate market. Where strategies are overly restrictive and do not acknowledge and respond to market conditions, transit-oriented development does not occur.



Montgomery County, Maryland started planning around the Bethesda Metrorail station before construction. New zoning and parking management helped make this station area a success.

- *Relation to Neighborhood Planning.* Station Area Planning works best when it directly responds to the needs of the surrounding community. This approach builds first on community support and desires, then leads to planning recommendations that integrate the station area (including any new TOD projects) physically with the surrounding community. By way of example, the Fruitvale BART Transit Village project has been spearheaded by a community-based organization, the Spanish Speaking Unity Council.
- *Community Involvement.* In San Francisco, the Muni Third Street Light Rail Project has included substantial community involvement to articulate economic development and housing affordability goals and to ensure that strategies to accomplish those goals are in place. A sample newsletter is shown on the following page.
- *Pedestrian-Supportive Infrastructure.* Pedestrian facilities, coupled with zoning that requires rain-protection and other features, enhance the pedestrian environment. Direct pedestrian connections between office buildings and rail stations, as in San Diego and San Francisco, improve transit access because they allow people to board trains while being protected from inclement weather. Pedestrian facilities also can improve security around stations because the presence of more people leads to more “eyes on the street.”
- *Parking Management and Shared Parking.* Parking “lids” in Downtown Portland and reduced parking requirements in Sacramento have helped make transit-oriented development viable. Portland allows less parking in areas near the MAX light rail stations than elsewhere in the city, and there are no minimum parking requirements. In the Third Street Light Rail Project, MUNI worked with local residents and businesses to develop parking recommendations that consolidated and increased on-street replacement parking and shared parking opportunities, preserved short-term parking with meters, and increased awareness of parking options with improved signage.
- *Zoning.* Overlay districts, use controls, building standards and requirements for pedestrian facilities help tailor zoning to station areas in Portland, Sacramento, San Francisco and San Diego. Adequate zoning, coupled with reduced parking requirements, helps attract transit-oriented development. Portland zoned for higher densities and transit-oriented development, then created interim development standards to prevent development of undesirable land uses before station area plans were completed.
- *Expedited Development Review.* “Fast-track” permit approvals have helped development around the Washington, DC Metro stations. In the San Francisco Bay Area, “umbrella” environmental review has shortened the review time around some BART stations where projects conform to station area plans. In San Jose, “specific plans” and planned unit development provisions were used in some station areas to streamline the review process.
- *Successful Demonstration Projects.* Several cities have created political support for TOD and joint development projects after the success of a demonstration project. In Washington, D.C., WMATA’s early larger-scale success with joint development led to the creation of an ongoing joint development program. In San Francisco, MUNI focused streetscape enhancement dollars in a commercial core area of the Third Street

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Light Rail Corridor, intending the project to catalyze other public and private investments. Streetscape improvements provided a tool for proactively involving children and the community; a visible sign of change, these improvements emphasized community pride in the public realm.



As the largest employer in downtown Sacramento, the State government has encouraged transit use with a strong transportation demand management program and parking limitations. Here is a downtown Sacramento street retrofitted with surface light rail tracks.

- *Public Investment and Assistance.* Redevelopment agencies have helped transit-oriented development with land assembly and financing in Oakland, Sacramento, San Diego, San Francisco, and Portland. Public investments can build confidence in the process and spur additional investments in station areas. Community facilities, child-care, and street beautification investments also help.
- *Local Transit Service.* Neighborhood access routes and “timed-transfer” arrangements help improve access to local businesses and employment centers, as well as support regional rail transit, commuter rail and express bus systems. The City of Vancouver and BC Transit rerouted bus service to feed passengers onto Sky Train light rail routes, but at the expense of bus service in some other areas. The case studies underscore the point that local bus service should be coordinated, not replaced, with light rail.
- *Joint Development.* Several transit agencies have experimented with joint development projects, and WMATA in Washington, D.C. has been one of the more successful. BART and the Santa Clara Valley Transportation Authority also have had successful joint development projects.

Implications for Seattle

To ensure successful implementation, some of the case studies lead to specific recommendations that could be considered in Seattle's Station Area Planning effort:

- *Quick Start Implementation Actions.* While sustained economic revitalization requires long-term, phased implementation, quick-start actions create opportunities to establish a foundation for immediate economic revitalization benefits for the community. Actions proposed to implement the Third Street Light Rail Project, for example, included a neighborhood ground-breaking celebration, neighborhood murals to screen construction staging areas, and painting the proposed rail alignment on Third Street.
- *Success Breeds Success.* Since not all station areas will develop in advance of rail construction, the City should establish priorities to focus efforts. Demonstrating success early in the life of a new light rail system can help foster future development. On-the-ground examples can provide better models for convincing developers of the virtues of transit-oriented development than abstract theories.
- *Coordination with Sound Transit on Joint Development.* The City and Sound Transit (the new regional transit agency that is planning, constructing, and operating Seattle's light rail system) should consider joint development opportunities where Sound Transit may be able to acquire land under its current legislative authority. The City can take the lead on land use planning and providing other redevelopment incentives.
- *Strong Merchant Participation.* Where transit operators and local governments have sought the participation of the neighborhood business communities, interest in transit-oriented development and revitalization is increased. This was demonstrated at the BART Fruitvale and San Francisco Third Street light rail line projects.



In Portland, Tri-Met has actively marketed joint development opportunities around stations, such as this site in Gresham.

- *Planning for Appropriate Development.* Models of development should be appropriate to local conditions. It is useful to learn from the experience of other cities, but adopting a cookie-cutter approach may not fit Seattle's circumstances. Development strategies for the station areas should be flexible enough to adapt to unanticipated changes in development patterns, types, and locations.
- *Working with Private Developers.* Municipalities and transit agencies should communicate with developers throughout the planning process and work with them to create opportunities for transit-supportive development that benefits communities and transit systems, as well as project developers. Communication can help foster realistic expectations on both sides of the table and increase the chances of producing mutually beneficial outcomes.

EXISTING CONDITIONS: DEVELOPMENT OPPORTUNITIES AND CONSTRAINTS

As part of the Station Area Planning effort, the existing site conditions of each potential station area in the Seattle light rail system were examined in detail. These conditions included their physical, socio-economic, and regulatory characteristics. More specifically, the analysis of each station area examined land uses, zoning, development opportunity sites, transportation, parking, the pedestrian environment, and urban design opportunities.

The existing conditions analysis serves two purposes: (1) to identify physical opportunities and constraints for transit-supportive development; and (2) to encourage and support desired development in station areas. This Summary provides a brief overview of the opportunities and constraints. This body of report (Chapters 4-9) provides a summary of issues and conditions common to all stations. Chapter 10, published separately, contains the station area profiles that provide a detailed description of site conditions for each potential station area under consideration.

Land Use

In general, transit-supportive development does not require a drastic change in the existing land uses, densities, or land use patterns in most of the Seattle station areas. Instead, changes can be made that maintain and enhance existing uses and character. The distribution of existing land uses within station areas is depicted on the map on the following page.

Current land use patterns suggest that two main types of opportunities are available for making station areas more supportive of transit use and pedestrian activity:

- *Changes in Land Use.* Changes in land use that can help support transit activity are limitations on auto-oriented commercial development and restrictions on large-scale or exclusive parking uses. Moreover, a mix of uses (including ground-floor retail with housing and/or offices above) can support and encourage transit and pedestrian trip-making.
- *Transit-Supportive Densities.* Certain minimum densities support transit and pedestrian activity. Moderate residential densities (15-20 units per acre) can create appropriate levels

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of transit demand for light rail ridership. Density incentives can further encourage mixed use or other transit-supportive development.

Zoning

Zoning can support transit use and walking by modifying provisions for mixed use development and limiting auto uses, as well as by strengthening provisions for pedestrian-sensitive streetscapes. Opportunities include the following:

- *More Focused Incentives for Mixed Use.* Current density incentives for mixed use are part of land use regulations for NC zones. Development incentives could be specifically targeted to the immediate station area, creating an incentive within the local neighborhood market that favors most intensive development near the station over locations farther from the station.
- *More Flexible Requirements for Mixed Use in NC Zones.* Reducing the mixed use provisions can provide developers with greater flexibility, therefore generating additional interest in development. For example, the City could reduce the minimum proportion of street-level non-residential uses from 80% to 60%.
- *Fewer Auto-Oriented Uses.* Currently, NC zones allow fuel sales, sales services, rental of commercial equipment, and warehouse uses. Such auto-oriented uses should be prohibited in station areas. Wherever a Pedestrian Overlay Zone (POZ) is expanded, auto-oriented uses are automatically prohibited. For instance, gas stations and drive-in businesses are permitted in NC zones, but not where there is a POZ. In areas without a POZ, a Transit Overlay Zone could provide this same control on auto-oriented commercial uses.

Transportation, Parking, and the Pedestrian Environment

Station areas can become more conducive to pedestrians, cyclists, and transit users by improving the conditions that make walking and cycling possible and by controlling auto mobility and access to station areas. Automobiles should not be prohibited from station areas, however, station areas should favor walking, cycling, and transit use in balance with automobiles.

- *Land Use Mix and Density.* Changing zoning provisions in the immediate vicinity of light rail stations would allow for land uses and densities that are more conducive to pedestrian activity. Strategies may include high-density residential development and targeted locations for ground-floor retail uses.
- *Traffic Calming Measures and Parking Management.* Traffic calming measures, including stop signs, special street treatments, and traffic diverters can help slow traffic in station areas to favor pedestrian and cycling mobility. Parking management can help limit driving to the rail stations, support the short-term parking needs of local businesses, and control the amount of parking through shared parking facilities and limiting development of new parking facilities.

- *Pedestrian Facilities.* Improved streetscapes, street trees, pedestrian/bicycle crossings, lighting, walkways, and other improvements can all help create an environment that is more conducive to walking. Establishing new pedestrian-supportive street design standards will ensure that private development, as well as public projects, support walking as a legitimate mode of access in station areas.

Urban Design Opportunities

Urban design strategies for station areas can build upon the existing urban design assets of individual station areas. Fortunately, many of Seattle’s potential light rail station locations coincide with existing neighborhood centers and community destinations.

- *Enhance Major Activity Centers.* Major activity centers can be visually enhanced with urban design elements that emphasize their importance in the urban landscape. Gateways to neighborhoods can be marked with distinctive streetscapes, banners, and artwork. Landscaping, paths, lighting, as well as special design features on buildings (cornice lines, fenestration, awnings) can help create a special station area character.
- *Improve Pedestrian Mobility.* Streetscape improvements can link community destinations and major activity centers to the station and can bridge barriers to pedestrian mobility.
- *Protect Key Landmarks and Views.* New development can frame, rather than obscure, important landmarks and views so that major urban elements of station areas are enhanced.

MARKET CONDITIONS

The analysis of existing market conditions for the segments of Seattle’s light rail system provide a basis for the station area market projections. Along with the analysis of existing site conditions, these projections indicate the extent to which transit-oriented development can realistically be supported in the station areas.

A review of recent market trends, development activity, and relative market strength indicates the relative ability of station areas to support housing, retail, and/or office development. Every station area can support some mix of housing, retail, and office development, but absent some intervention in the market, some station areas would have stronger markets for particular types of development.

- *Housing.* Station areas with the strongest housing markets are Broadway at Roy, Capitol Hill, and First Hill, all of which are desirable residential neighborhoods. Most other station areas have at least a low to moderate market strength for housing.
- *Retail.* Station areas with the strongest retail markets are Northgate, Convention Place, and Westlake. The McClellan station area can also support retail development.
- *Office.* Office markets are strongest in the Downtown station areas, particularly University Street. Station areas located north of Downtown have at least a moderate ability to support office development. Stations south of Downtown and in the Rainier Valley have little potential to support office development.

NEIGHBORHOOD PLAN REVIEW AND STAKEHOLDER INTERVIEWS

The inventory phase of Seattle's Station Area Planning process also considered existing neighborhood planning efforts applicable to station areas in the light rail system. This review identified key planning issues in neighborhoods to determine whether concepts for Station Area Planning and for neighborhood plans were consistent, and to identify opportunity sites for integrating the two planning processes.

Key Findings and Issues

The neighborhood plan review found a high level of compatibility between neighborhood planning objectives defined through the current neighborhood planning process and planning considerations for transit station areas. Most neighborhoods see transit stations as an opportunity not only for increased mobility, but also as a place around which to focus future development. There is recognition, however, that transit stations must be carefully integrated with the surrounding community and, to this end, many issues and potential impacts will need to be addressed.

Several citywide issues emerged from the review of neighborhood plans and survey of neighborhood perspectives. These issues will need to be addressed in most, if not all, of the station areas throughout the city. The challenge for the City's station area planning program will be to determine how to:

- Manage *parking* and discourage automobile access to the light rail system;
- Ensure convenient *local transit connections* to transit stations;
- Minimize the potential *displacement of existing neighborhood businesses* caused by construction impacts, changing parking needs, and changing markets;
- Plan for investments needed to improve the *pedestrian environment* within station areas;
- Provide clear *signage* and *highly visible entrances* to transit stations; and
- Ensure strategies to enhance *public safety* at and around transit stations.

Corridor Segment Highlights

Each segment of the proposed light rail system has distinctive concerns:

- *Northgate to University*: Neighborhoods along the northernmost segment of the light rail system are expecting and planning for light rail. The biggest overall concern in these neighborhoods is making sure that construction of the light rail line is funded to Northgate so that the University District does not become the northern terminus for the line. In addition, there is strong interest in shaping the considerable development activity already occurring in these neighborhoods so that it is compatible with future transit sta-

tions and responsive to the neighborhoods' objectives. Parking impacts also must be addressed.

- *University to Downtown - Capitol Hill/First Hill Alignment:* The highly urban neighborhoods of Capitol Hill and First Hill eagerly await light rail. There are many good opportunities for infill development, but as the area is already quite dense, no large scale changes in development are expected. Parking management and traffic congestion are key concerns.
- *University to Downtown - Alternative Alignment:* The neighborhoods around the Eastlake, South Lake Union, and Seattle Center station areas remain uncertain about whether light rail is a real possibility and are divided on whether it is desirable. Station area planning is premature until Sound Transit has selected a preferred alignment.
- *Downtown:* The four Downtown stations (along with the International District station) already exist in conjunction with the Downtown bus tunnel. Therefore, while light rail is expected to improve mobility within the region, it is not likely to result in significant changes in land use and development Downtown. The Denny Triangle area has the most at stake, with its neighborhood plan calling for significant new construction and redevelopment centered around the Convention Place transit station, even as the station is subject to redesign and possible relocation as part of the new system. Pioneer Square and the International District station areas also face significant development activity, which will increase activity around those stations. A major concern throughout the Downtown area is the impact of buses returning to surface streets from the existing bus tunnel when light rail begins, and the associated decrease in transit efficiency and increase in traffic congestion on the street.
- *South of Downtown-Busway/Stadium Area Alignment:* Until the alignment question is resolved (with a preferred alternative selected early in 1999), the North Duwamish/SODO neighborhood faces uncertainty about whether it will have light rail and how much attention to give to Station Area Planning at this time. Numerous large-scale development and transportation projects currently dominate the area. If the decision is made to locate transit stations in this corridor, a close look at zoning will be required to ensure that adequate provisions are in place to protect the long-term industrial use of the area and to ensure that freight mobility is not adversely impacted by light rail. Safe, secure pedestrian connections to the stations also need to be provided.
- *Central and Southeast:* Planning in these neighborhoods (including Central, North Rainier/Columbia City, MLK @ Holly, and Rainier Beach) to date has focused on the light rail alignment and station alternatives, as well as the impacts of elevated vs. at-grade vs. below grade tracks. Many station alternatives are currently being reviewed and, therefore, most neighborhood plans cannot be very specific yet in addressing station area concerns. Opportunities for new development are greatest here because (1) existing land use is less intense than in neighborhoods to the north, and (2) economic revitalization is a key objective for Southeast Seattle. Thus far, however, private developer interest in this area has been weak. Stakeholders interviewed during the neighborhood plan review cite barriers to redevelopment (such as a reputation for crime and poverty) and hope that Sound

Transit's plans and related investments will help "jump start" much-needed development in these areas.

Implications for Station Area Planning

Recommended steps to create a smooth transition from neighborhood planning to Station Area Planning include:

- Providing early feedback to neighborhoods on Station Area Planning considerations that affect their draft plans and recommendations;
- Clarifying citywide objectives for Station Area Planning;
- Highlighting, as part of the neighborhood plan approval and adoption process, specific Station Area Planning issues that require further consideration;
- Establishing a clear process and timeline for development of station area recommendations that are sensitive to the community circumstances in each station area; and
- Establishing an efficient and collaborative process for Station Area Planning, including formation of local citizen-based planning groups for each station area.

CITY COUNCIL PERSPECTIVES ON TOD AND STATION AREA PLANNING

The inventory phase of Station Area Planning work also included interviews with Seattle City Councilmembers to obtain their perspectives on Station Area Planning as it relates to *the Seattle Comprehensive Plan* and neighborhood plans. Councilmembers generally agree that station areas can provide a framework for future commercial and housing development, consistent with the *Comprehensive Plan*, while also enhancing existing neighborhoods and promoting transit use. Individual perspectives and priorities of the Councilmembers, based on perceptions of need and policy orientation, differ. Certain issues that emerged in all of the interviews will need attention in the next phase of planning:

- *Density*: how to provide support for transit service, while respecting the scale and character of neighborhoods;
- *Displacement and Gentrification*: how to avoid these impacts and support businesses and residents who might be adversely affected;
- *Need for Market Development Strategy*: how to capture opportunities for appropriate economic development, and how actively involved the City should be in this effort;
- *Land Speculation*: how to devise incentives that will benefit existing owners and developers, without encouraging speculation; and
- *Communication and Expectations*: how to establish and maintain good communication, particularly with non-English speaking communities, and create realistic expectations about the influence of light rail.

PERSPECTIVES OF THE DEVELOPMENT COMMUNITY

During a full-day of small focus group discussions with 50 individuals involved in Seattle's development community, key recommendations surfaced in response to the question of what three things the City could do to encourage transit-oriented development:

- *Be bold.* City policymakers need to be visionary and make some tough decisions to realize the potential of transit-oriented development.
- *Tailor solutions to station area needs.* The best programs for transit-oriented development combine flexible zoning with targeted City resources and private resources. The City needs to listen to the neighborhoods and to the users of the system.
- *Establish predictability in the process.* Developers want to know what the rules are so they can have greater confidence in project feasibility analysis. Anything the City can do to reduce potential risk will improve the attractiveness of TOD as an option for real estate investment. Having a “fast-track” procedure for projects that conform to Station Area recommendations would be an attractive option for developers.
- *Focus on a few stations early in the process.* It is important to show some early successes to build confidence and experience within the development community. The City also should share the successes of other cities to build developer confidence in Seattle's Station Area Planning program.
- *Adopt a flexible overlay zone with design review in station areas.* The City should employ an efficient design review process to allow greater flexibility for development within station areas while ensuring good design. Incentives and bonus provisions also can help. Some neighborhood commercial districts already offer density incentives for mixed use development, but provisions could be adjusted to make the incentives even more attractive. The City should quickly approve projects that meet these station area design requirements.
- *Adopt Programmatic or Planned Action EISs to streamline the permit process.* By conducting an area-wide environmental review on the full build-out of station areas, the City could substantially reduce the time and uncertainty associated with developing new projects.
- *Develop a comprehensive parking management program for station areas.* How parking is handled often is critical in making projects work financially. Reduced or eliminated requirements have been suggested. Shared parking facilities and Residential Parking Zone overlays can also be used more widely and effectively.
- *Target public investment in Southeast Seattle stations.* The station areas in the Rainier Valley will likely require more public investment than those north of Downtown. The redevelopment at Holly Park provides an excellent opportunity to create a diverse mix of housing and commercial uses near a new light rail station.
- *Work with lenders to develop pools of capital to support qualified projects in station areas.* Sharing the risk of lending to non-traditional product types can help build capacity and confidence within the lending community for mixed use developments.

POTENTIAL DEVELOPMENT STRATEGIES FOR STATION AREAS

The case studies, neighborhood plan review, and interviews with City Councilmembers and the local development community formed the basis of detailed examination of each potential station area in the light rail system. These findings were supplemented by the results of land use surveys, market segment analyses, and urban design field observations. With this information, preliminary development strategies were prepared for each station area.

The potential strategies to encourage transit-oriented development around Seattle's station areas include an array of actions that have proven successful in other cities. At this point, these strategies are still "generic," but they will be refined for individual station areas once Sound Transit has decided on a preferred light rail alignment and specific station locations.

The potential strategies include:

- *Land Use Tools.* New overlay zones and modifications to existing zoning can provide for appropriate densities, standards, and design review procedures to promote pedestrian-oriented and transit-supportive development, incentives for mixed use development, and affordable housing. Restrictions on auto-oriented uses and reduced parking requirements can be implemented through the Land Use Code.
- *Pedestrian Networks.* Well-designed streetscapes with facilities for pedestrians and links to adjacent neighborhoods facilitate access to transit stations. By attracting more people to station areas, pedestrian facilities improve security. Pedestrian overlay zones, in addition to underlying zoning provisions, can be used to improve the pedestrian environment.
- *Economic and Financial Assistance.* Transit-oriented development projects could benefit from assistance for affordable housing and revitalization programs. The City could investigate the viability of leasehold excise tax exemptions, the success of the property tax exemption for qualifying development in targeted areas, and partnerships with financial institutions to pool capital to invest in TOD projects.
- *Regulatory Process.* Expediting permit review and providing for streamlined environmental review are two proposals for improving the review process for transit-oriented development.
- *Local Transit Service.* For Seattle's light rail system to function effectively, it will need to be supported by closely-coordinated local bus service. As laid out in the 1995 King County Metro Six-Year Plan, some station areas are slated for service and facilities improvements. Additional transit improvements will need to be considered in conjunction with light rail.
- *Development Partnerships.* Where local markets are weak, the City can enter into development partnerships to help "kick-start" development. Local community development corporations and other public agencies can participate in such partnerships to leverage public resources.
- *Pilot Projects.* Pilot projects are near-term actions that the City could take to show how TOD can work effectively in Seattle. 'Showcase' pilot development can inspire the private sector to undertake transit-oriented development projects.

Throw Page: Development Strategies

For each station area, a combination of potential strategies are detailed in Chapter 10 of this Report. The matrix on page xviii shows which strategies are proposed as high priority actions in specific station areas, which strategies are recommended for mid- to long-term implementation, and which strategies require further study. The matrix also indicates which strategies are already being implemented.

MARKET FORECASTS

Market forecasts were developed to determine the potential impact of light rail stations and transit-oriented development on population and job growth in station areas. Three development forecasts (for the year 2020) were prepared for each station area:

- The base case: growth without light rail transit (LRT) and no changes to existing zoning;
- A forecast assuming LRT and no supporting actions; and
- A forecast assuming LRT with supporting actions (or station area development strategies).

Consistent with the findings of the case studies, light rail alone is not expected to profoundly redirect regional growth as transit-oriented development in Seattle. Light rail will attract some development in some station areas, particularly where light rail provides a relative increase in accessibility to the region. For the most part, however, other supportive actions are necessary to encourage development around transit stations. Supportive policies can help channel development to station areas that would otherwise gravitate to other parts of the city or elsewhere in the region.

A wide variety of supportive actions can increase the total number of dwelling units and commercial floor area near transit stations. Potential actions are summarized in Chapter 9 of this report. Chapter 10, published separately, presents a detailed description of potential development strategies for each station area.

If the potential actions are taken, station areas overall would experience much more development than they would without any additional supportive actions by the City. The increase in development that would result from supportive actions varies widely between station areas. For example, total dwelling units would be expected to increase by more than 75% in the Northgate station area and by only about 6% in the Beacon Hill station area. The different effect of City actions at the different station areas is explained by the varying site and market conditions within each station area.

STATION AREA ATLAS

The Station Area Atlas, published separately, includes large-scale summary information for each station area. The two pages for the Capitol Hill Station area which follow show how these Atlas pages are organized.

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NEXT STEPS

Seattle's Station Area Planning effort is currently involved in community discussions about station and alignment alternatives. In some station areas, more detailed planning for potential TOD projects may be initiated soon. In other station areas, planning will follow decisions by the City and Sound Transit on preferred alignments and station locations. The City is already involved in several "pilot TOD" development projects in several station areas to ensure coordination with the light rail project.

The City has begun work to establish a policy framework that identifies key goals, objectives, and implementation strategies for the city as a whole and for each station area. The policy framework must establish a clear direction for station area land uses, densities, access, transit connections, pedestrian and bicycle circulation, urban design, safety, and potential development projects and partnerships. These framework goals and strategies will provide two kinds of guidance for the next phase of the planning process. First, they will provide a basis for evaluating the key issue areas for individual Station Area Planning efforts. Second, they will establish the new policies, incentives, regulations, and/or other City actions that will be developed to support TOD in light rail station areas.