

C TDM Plan Templates for Non-Residential Projects



Tier 1 TDM Plan Template for Non-Residential Projects

City of Carlsbad
1200 Carlsbad Village Dr.
Carlsbad, CA 92008

How to Use this Template: All non-residential developments that meet trip generation thresholds specified in the city’s TDM Ordinance must submit a TDM Plan. This template applies to projects identified as Tier 1 projects.

Process

The following steps outline the TDM plan process for Tier 1 non-residential projects:

1. After the determination was made that a Tier 1 TDM plan is required, the Transportation Administrator is available to discuss the project, review the requirements and assist with completion of the plan.
2. Applicant completes this template and prepares supporting documentation for Section III Existing Conditions and TDM Context.
3. Applicants signs and obtains the transportation coordinator’s signature.
4. Applicant submits template with supporting documentation within 4 weeks of expecting to occupy the space.
5. Approved plan is required prior to occupancy.

Get started

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: Jennifer Horodyski at (760) 602-2747 or via email at **Jennifer.horodyski@carlsbadca.gov**.

Tier 1 TDM Requirements

Submission Date:

SECTION I: Developer Profile

Developer Name: _____

Property Manager Name: _____

Developer Mailing Address: _____

Number	Street	Suite
_____	_____	_____
City	State	Zip Code
_____	_____	_____

Primary Contact: _____ Email: _____

Phone: _____

SECTION II: Project Information

Project Name: _____

Permit Number: _____

Project Address: _____

Number Street Suite

City State Zip Code

Type of Use

Select the primary use type for this project.

- Office
- Retail/Restaurant
- Warehouse/Industrial
- Other, please describe use: _____

Number of Employees

Specify the number of employees at this location.

Number of Full-Time Employees _____

Number of Part-Time Employees _____

Number of Contract Employees _____

Total Number of Employees _____

Automobile Parking

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

SECTION III: Existing Conditions & TDM Context

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

Relevant Existing TDM 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, or III) adjacent to the site*
- *Transit or shuttle services serving the site with a stop/station within a ¼ mile (or a 5-minute walk)*

Relevant Project-Specific TDM Infrastructure

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

SECTION IV: Tier 1 Requirements

Check the boxes and provide the required information below.

- Designate a Transportation Coordinator (TC)**

All developments subject to the TDM ordinance are required to designate an on-site transportation coordinator responsible for implementing the requirements listed below. The transportation coordinator agrees to attend at a minimum one citywide TDM program meeting or event per year and to distribute marketing information provided by the citywide program. The contact listed below may be an interim contact until a permanent transportation coordinator is identified. This contact shall be an employee of the tenant’s organization. Developer is responsible for notifying the City of Carlsbad any time the transportation coordinator contact changes in the future.

Provide the name, company, title and contact information for the TC.

Distribute New Hire Transportation Information

Transportation coordinator agrees to distribute transportation options information provided by the citywide TDM program to all new employees at the point of hiring.

Promote One Citywide Event per Year

Transportation coordinator agrees to actively promote at least one citywide event (provided that at least one event is held each year).

Comply with Monitoring and Reporting

Transportation coordinator 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. Survey results along with a status report of above listed activities will be submitted to the city within one month of survey completion.

In addition, transportation coordinator agree 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 identify and implement additional measures suitable to the project site.

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

SECTION V: Authorization for Occupancy

By signing below, developer 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 implementing the required Tier 1 TDM plan elements listed above and participate in ongoing monitoring.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name and Organization	Signature	Date

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

Printed Name and Organization	Signature	Date

Name and Signature of City of Carlsbad Representative:

Printed Name	Signature	Date



Tier 2 and 3 TDM Plan Template for Non-Residential Projects

City of Carlsbad
1200 Carlsbad Village Dr.

Carlsbad, CA 92008

How to Use this Document: Non-residential developments that meet trip generation thresholds specified in the city's TDM Ordinance must submit a TDM Plan. This template applies to projects identified as Tier 2 and Tier 3 projects.

The average new development is required to submit and implement a TDM plan that achieves 18 points. The average redevelopment/tenant improvement is required to submit and implement a plan that achieves 9 points.

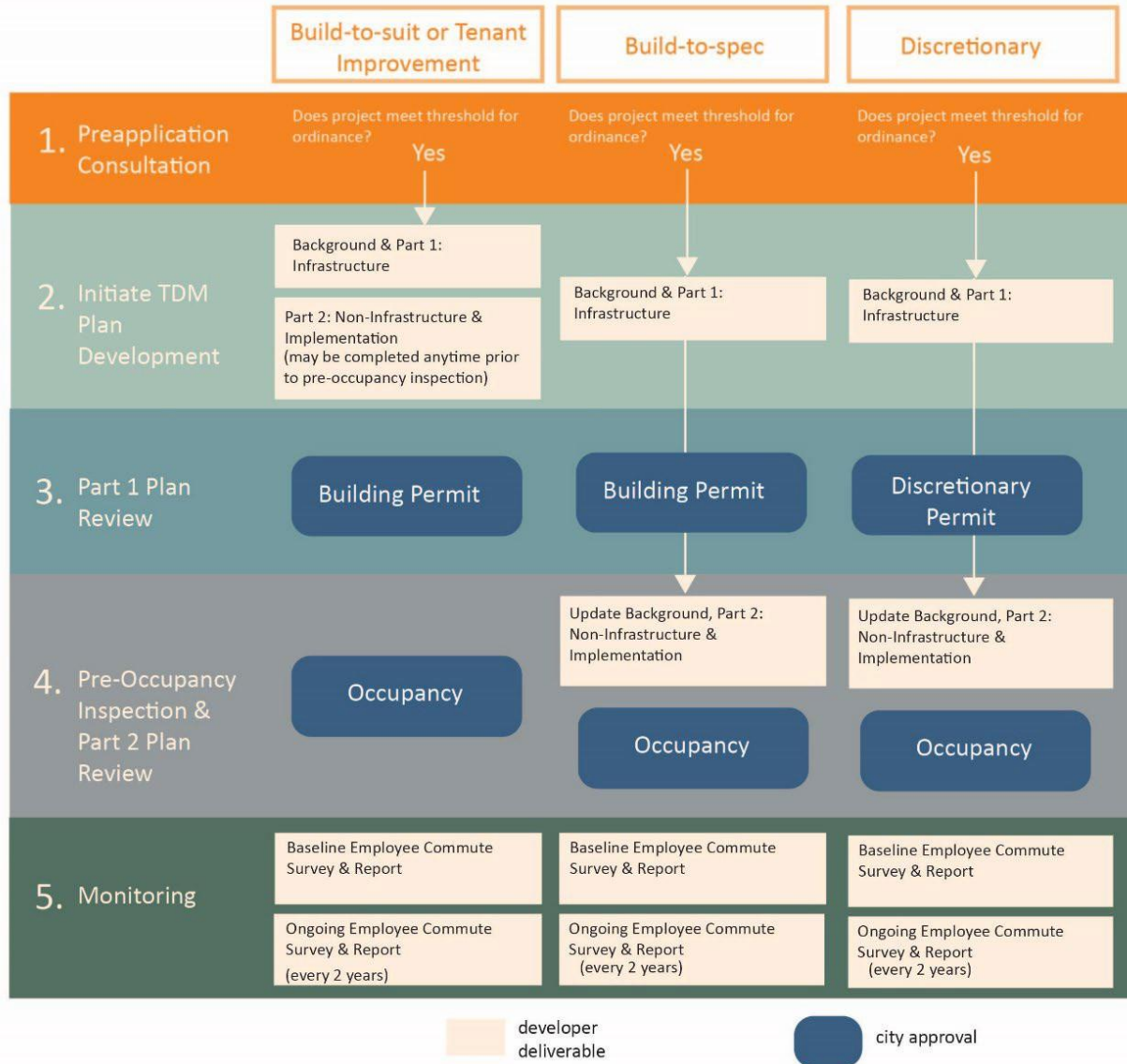
The Carlsbad Transportation Administrator (TA) is available to support developers with TDM Ordinance compliance and completion of your plan. To get started or for questions, please contact: Jennifer Horodyski at (760) 602-2747 or via email at Jennifer.horodyski@carlsbadca.gov.

The process for non-residential development is outlined graphically below. The TDM plan process is organized into two separate parts:

1. All developments subject to the ordinance must submit Part I: Project Background, Existing Conditions and Infrastructure TDM Strategies of the TDM plan prior to building permit issuance.
2. Part II of the TDM Plan consists of non-infrastructure strategies and must be submitted and approved prior to occupancy. Build-to-suit projects and tenant improvements may submit Part II along with Part I prior to building permit issuance.

Lastly, 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.



PART I: Project Background, Existing Conditions and Infrastructure TDM Strategies

Submission Date: _____

This section must be completed prior to building permit issuance and updated prior to occupancy as needed.

SECTION I: Developer Profile

Developer Name: _____

Property Manager Name: _____

Developer Mailing Address: _____
Number Street Suite

City State Zip Code

Primary Contact: _____ Email: _____

Phone: _____

SECTION II: Project Information

Project Name: _____

Permit Number: _____

Project Address: _____
Number Street Suite

City State Zip Code

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.

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

Land Use and Area

Complete the chart below to include each non-residential use, gross floor area and expected number of employees allocated to each use.

Land Use	GFA	Employees
H-0 Hospital		
C-1 Neighborhood Commercial		
C-2 General Commercial		
C-T Commercial Tourist		
C-M Heavy Commercial		
C-L Local Shopping Center		
O Office		
V-R Village Review		
L-C Limited Control		
M Industrial		
P-M Planned Industrial		
Total		

Automobile Parking

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

SECTION III: Existing Conditions & TDM Context

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

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

Relevant 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

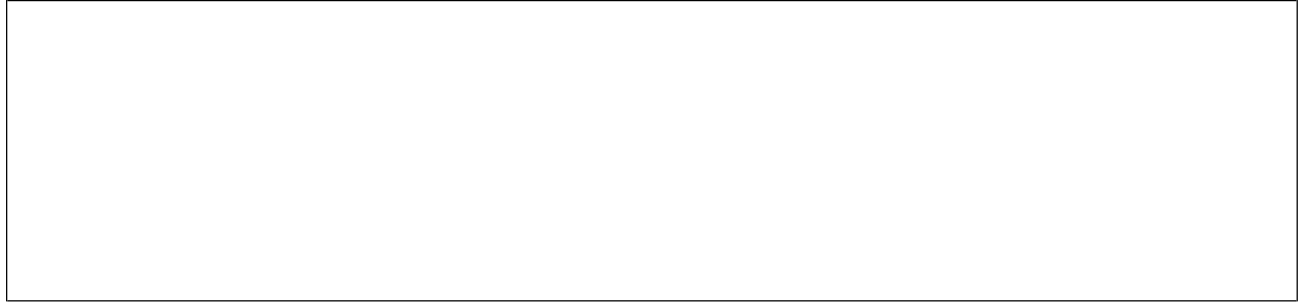
Count and report the number of project-specific and neighboring amenities onsite or within a 5-minute walk (1/4 mile) of the project site and provide map.

- *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 commute hours based on shifts or typical work hours*
- *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 IV: Infrastructure TDM Selections

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

Please reference **Table 2-4 Menu of TDM Strategies, Part I: Infrastructure** found in the Non-Residential Developer TDM Plan Guidelines within the TDM handbook for infrastructure strategies and points. An average new development is required to achieve a total of 18 points while a redevelopment/tenant improvement is required to achieve 9 points. Required strategies add 4 points towards the total required number of points. New developments must achieve a minimum of 6 points through infrastructure strategies unless otherwise agreed upon with city staff. Tenant improvement projects are eligible to achieve all required points in Part II.

In case of a tenant improvement, if the tenant has access to any infrastructure amenity below, 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.

Points not earned through infrastructure strategies will be expected to be earned in Part II.

Reference Part II strategies to ensure that the appropriate infrastructure is selected to support desired amenities or programs.

Infrastructure strategies must be selected and approved prior to building permit issuance.

Programmatic strategies in Part II may be submitted after the building permit has been issued, but must be approved prior to occupancy.

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 for details about each strategy.

Secure Bike Parking

Points Requested:

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. Refer to the handbook for the number of spaces required to earn points. If practical, include location on the site map.

Public Bike Parking

Points Requested:

Indicate the number of short-term spaces and the type of bike rack to be provided and where they will be located on the project site. Refer to the handbook for the number of spaces required to earn points and guidance on installation. If practical, include location on the site map.

Bicycle Repair Station

Points Requested:

Describe what items will be included in the bicycle repair station and where it will be located within the project site.

Micromobility Parking

Points Requested:

Indicate where micromobility parking space (or interim bike racks) will be located on the project site. If practical, include location on the site map.

Transit Shelter Additions or Improvements

Points Requested:

Describe the location of transit stops and what types of additions/improvements are being proposed.

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. Refer to the handbook for guidance on the required number of spaces. Maximum points will be awarded when offered in conjunction with ride-matching services.

Parking Spaces for Car Share Vehicles

Points Requested:

Indicate the number of reserved spaces to be provided for car share vehicles and where they will be located on the project site. Should be offered in conjunction with car share vehicles.

End of Trip Facilities

Points Requested:

Indicate the number of showers and changing rooms and where they will be located on the site/building 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. Provide a map showing the location of these amenities.

Bicycle and Pedestrian Connections

Points Requested:

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

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.

SECTION V: Authorization for Building Permit Issuance

By signing below, Developer certifies that the information provided in this document is complete and accurate. By signing this document, a developer is committing to build/provide the infrastructure strategies identified in this document. Failure to provide the identified infrastructure may result in a building not obtaining an occupancy permit until such infrastructure is constructed or other commitments are made to reduce vehicle trips by an amount equivalent to the trips that would have likely been reduced by constructing and providing the listed infrastructure strategies. The developer also acknowledges that commitments to implement additional TDM strategies and monitor and report on those strategies must be made prior to occupancy. These commitments can be made by completing Part II of this document and obtaining subsequent approval of the proposed strategies and monitoring plan.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name	Signature	Date

Name and Signature of Property Owner (if different from above):

Printed Name	Signature	Date

Name and Signature of City of Carlsbad Representative:

Printed Name	Signature	Date

PART II: Non-Infrastructure TDM Strategies, Implementation and Monitoring Plan

Submission Date:

This section must be completed and approved prior to occupancy.

SECTION I: Non-Infrastructure TDM Selections

The developer will work with the TA to determine strategies applicable to the site.

Please reference **Table 2-5 Menu of TDM Strategies, Part II: Non-Infrastructure** found in the Developer TDM Plan Guidelines within the TDM handbook for relevant infrastructure strategies and points. It is expected that Part II will contain a sufficient number of strategies to earn the remaining required points not earned through infrastructure strategies. A total of 18 points is required from Part I and Part II combined for new developments and 9 points for redevelopments/tenant improvements. Required strategies add 4 points towards the required total. The non-infrastructure strategies are organized into the following categories: amenities, policies, developer/employer programs, employer programs, partnerships and innovation. A well-rounded, effective and sustainable TDM plan should include strategies from multiple categories and be applicable to the anticipated workforce and commute patterns.

Check the box to the left of the strategy if it will be included in the development. Provide information as requested in the box below the strategy. Additionally, indicate the points requested for the strategy. Refer to the Carlsbad TDM Handbook for additional guidance and for the number of points available for each strategy.

Required Strategies

Transportation Coordinator

Points: 1

All developments subject to the TDM ordinance are *required* to 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 and otherwise ensuring compliance with City of Carlsbad TDM Plan requirements.

Provide the name, title and contact information for the TC.

Distribute New Hire Transportation Information **Points: 1**

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 **Points: 2**

Transportation Coordinators of 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 at least one event held by the citywide TDM program (if available).

Elective Strategies

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. Indicate the number of reserved spaces to be provided for car share vehicles and where they will be located on the project site.

Micromobility Service Credits **Points Requested:**

Describe the micromobility service that will be available for use by employees/tenants and the level of service credits/subsidy. Indicate if all employees/tenants will have access to the service credits and how the program will be administered.

Real-Time Travel Information **Points Requested:**

Describe the proposed location of the resources and any other relevant information (i.e., range of the WiFi hotspot, location of real-time travel information screens or kiosk).

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 location of these amenities if applicable and discuss agreements between vendors and schedules.

Policies

TDM in Leases and Purchase Agreements

Points Requested:

Applies to new developments only. Provide language that will be included in the lease that will allow for TDM supporting roles.

Non-Standard Vehicle Policies

Points Requested:

Applies to new developments only. Describe the site's non-traditional vehicle management plan. This strategy may be implemented with the non-standard vehicle parking infrastructure strategy (micromobility/bicycle/etc.).

Developer/Employer Programs

Mobility Services Incentives Budget

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.

Ride-matching Services

Points Requested:

Developer should discuss plans to create an internal ride-matching program. At a minimum, developer will promote existing ride-matching platform.

Guaranteed Ride Home (GRH) Services

Points Requested:

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

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 range based on 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.

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SECTION III: Implementation (New Developments Only)

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

SECTION IV: Monitoring

By signing below, developer 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, developer 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, developer 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 identify and implement additional measures suitable to 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 V: Authorization Occupancy

By signing below, developer 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 IV.

Name and Signature of Developer Representative or Designated Applicant:

Printed Name and Organization	Signature	Date

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

Printed Name and Organization	Signature	Date

Name and Signature of City of Carlsbad Representative:

Printed Name	Signature	Date