Regional Policy Background Papers – Winter 2013

Economic Development (Draft for Discussion)

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1. Introduction

The San Francisco Bay Area is nearing completion of Plan Bay Area, an integrated land use and transportation plan required per California law, Senate Bill 375. With Plan Bay Area, the regional agencies for the first time are closely linking long-term land use planning, transportation investments, and housing production to achieve the region's sustainability goals. The long-term vision for the Bay Area's growth is outlined in the Jobs-Housing Connection Strategy,[1] the land use component of Plan Bay Area. A central goal of the Jobs-Housing Connection Strategy is to create jobs to maintain and expand a prosperous and equitable regional economy.

The San Francisco Bay Area has historically experienced robust economic growth and opportunity linked to its leadership in high technology and innovation, connections to international networks, world-class higher education and research institutions, and a highly skilled labor force. The recession, however, has disrupted livelihoods and communities, altering the landscape of challenges and opportunity in our metropolitan region.

While employment growth in the region is contingent on a successful future national and global economy, the Bay Area can expect healthy but slower employment growth than in the past several decades. However, a clear strategy for expanding economic opportunities across strategic sectors and for all portions of the population is necessary in order to ensure a healthy economy and prosperous future for the region.

This policy background report expands upon the regional growth forecast and employment analysis that has been presented in the Jobs-Housing Connection Strategy to describe future employment patterns in the region by industry sector, occupation and place. The analysis emphasizes the spatial components of employment, including the links between employment sector and land use. With this analysis, we articulate a spatial framework for supporting economic development that identifies key priorities and strategies for economic growth linked to industry and place. This report is intended to provide context and framing on regional employment growth to support identification of potential industries of opportunity for the HUD Economic Prosperity Strategy.[2] Paired with existing and ongoing regional economic analyses looking at access to employment, workforce development, and regional economic competitiveness, this background report will help to provide a comprehensive set of economic and workforce development priorities for SCS implementation.

2. Regional Employment Assessment

The regional employment forecast and spatial distribution of the expected employment growth in the Jobs-Housing Connection Strategy (JHCS) is based on a consistent approach that links robust economic growth with a sustainable land use pattern that will serve to better link workers to jobs, support local economies, and promote the economic competitiveness of the region. The forecast is built upon the relative strength of different sectors of the regional economy and the spatial pattern of growth in these sectors, based on several critical themes. A detailed discussion of past and future employment trends, the

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[1] Document available at:

[2] The Bay Area Regional Prosperity Plan is a three-year regional initiative made possible by a $5 million grant from the U.S. Department of Housing and Urban Development (HUD). The Prosperity Plan includes two key, interconnected areas of work: an Economic Prosperity Strategy that will define a regional approach for expanding economic opportunities for low- and moderate-income workers in the region; and the Housing the Workforce Initiative that will provide tools and resources to improve housing affordability near transit for a range of income groups while stabilizing low income neighborhoods as new investments raise property values. Link: http://onebayarea.org/regional-initiatives/Bay-Area-Prosperity-Plan.html#.UQATLyf7LTo.

spatial component of employment in the region, and occupations and wages is presented below that highlights these key regional employment themes. [3]

2.1 Past and Projected Employment

The primary drivers of the Bay Area economy are the Professional, Scientific, and Technical Services, Government, and Educational and Health Services sectors. These three sectors made up 17 percent, 15 percent, and 13 percent of total employment in 2009. The Leisure and Hospitality, Manufacturing, and Retail sectors each accounted for 10 percent of total employment, while the Finance & Leasing sector (finance, insurance and real estate), Construction, Wholesale Trade, Information, Transportation, Warehousing and Utilities, Farming and Other each comprised less than 10 percent of Bay Area employment in 2009.[4]

Economic trends of the last several decades in the Bay Area reflect this industry mix, though as shown in **Figure 1**, between 1990 and 2008, there have been significant changes in the composition of the regional economy. In general, employment has:

- Experienced strong growth in the knowledge-based and local service sectors. Knowledge-based sectors include: Information; Professional, Scientific and Technical Services; and Finance and Leasing. Local service sectors include: Retail; Health and Education; and Construction.
- Declined in in the industrial and production-related sectors (Manufacturing and Wholesale; and Transportation and Utilities)
- Varied in volatility across sectors.[5]

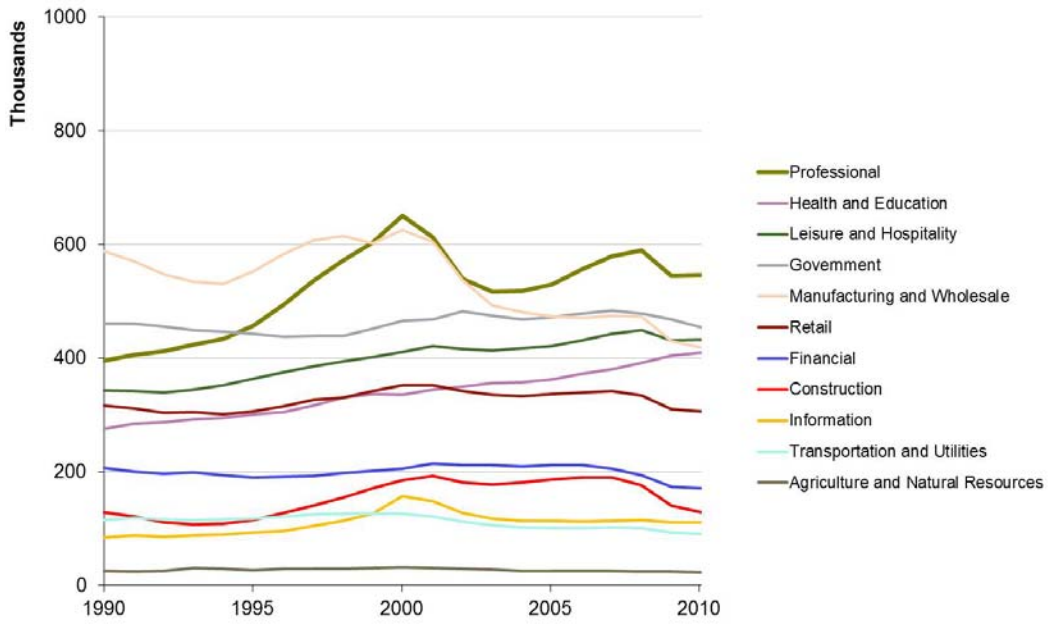
Figure 2 shows the spatial distribution of jobs in 2010 shown by total number of jobs by jurisdiction, broken out by jobs within and jobs outside the region's Priority Development Areas (PDAs).

[3] The following sections are largely adapted from the Plan Bay Area *Jobs-Housing Connection Strategy*, (May 2012) and the work of the Center for the Continuing Study of the California Economy (CCSCE), Strategic Economics, and Karen Chapple (University of California at Berkeley) for ABAG. Link to Plan Bay Area *Jobs-Housing Connection Strategy*: http://www.onebayarea.org/pdf/JHCS/May_2012_Jobs_Housing_Connection_Strategy_Main_Report.pdf

[4] Strategic Economics, Memo *to ABAG: Historic and Projected Employment Trends in the Bay Area*. July 2011.

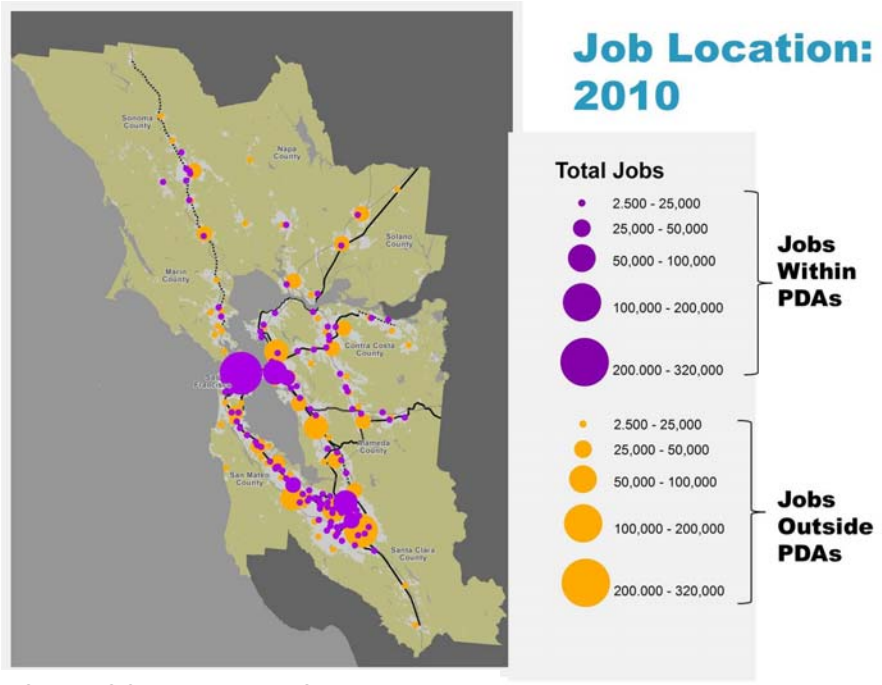
[5] Ibid.

Figure 1: Regional Employment by Sector, 1990-2010



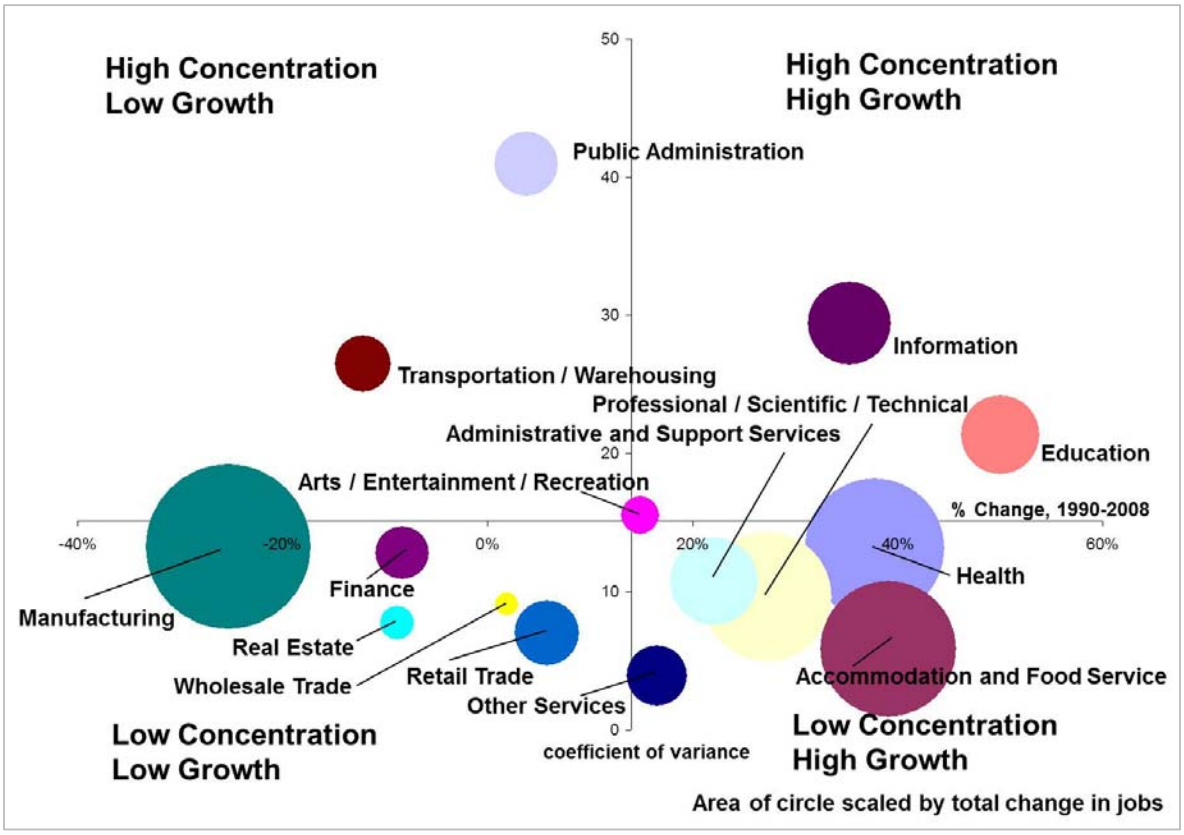
Source: EDD, Strategic Economics

Figure 2: 2010 Job Location



Source: US Census Bureau, ABAG

Figure 3: 2010 Industry Growth and Spatial Concentration



Looking more closely at the spatial distribution of jobs and scale of growth by industry helps to define where one can expect different types of jobs will be located and how the pattern of employment relates to land use, access to the transportation network, and even building type and density. **Figure 3** plots the spatial change in jobs in the region, or employment growth and spatial concentration by sector[6].

Information and Education stand out as the high growth, high concentration industries. However they represent smaller changes in actual number of jobs (as shown by the scale of the plotted circle). .Education jobs are concentrated in the major research universities. Information jobs are primarily in a few key companies in Silicon Valley and San Francisco. Healthcare and Professional/Scientific/Technical are expected to experience lower spatial concentration and lower rate of growth, but their total job growth reflects a much larger share of the region's overall job growth over the past 20 years.

Public Administration is the most highly concentrated industry, but overall growth in this sector has been small over the past two decades. Over the same time period, the Manufacturing sector has shed the most number of jobs, primarily in Silicon Valley and the I-880 corridor. Jobs in the Manufacturing sector have

[6] The horizontal axis measures the change in number of jobs in each sector from 1990-2008. The axis runs from -40% to +60%. The vertical axis measures the spatial concentration of jobs in each sector by the coefficient of variance of jobs per census block. On this chart, an industry where all the jobs in the region are in a single census block would be at the very top, and an industry where every census block has the same number of jobs in that industry would be at the very bottom. The chart separates industries into four groups (by quadrant): high growth and high concentration, low growth but high concentration, low concentration but high growth, and low concentration and low growth

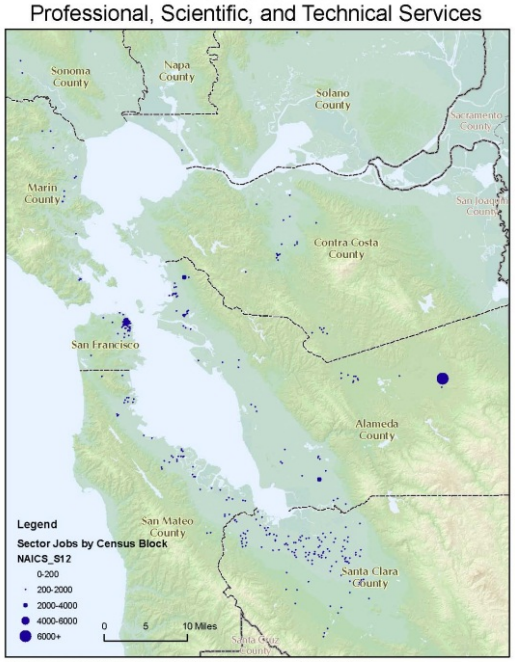
also been relatively dispersed throughout the region. **Figure 4** illustrates the regional spatial patterns for several of these industry sectors

Figure 4: Regional Spatial Distribution & Relative Concentration by Industry Sector

NAICS Sector 51: Information

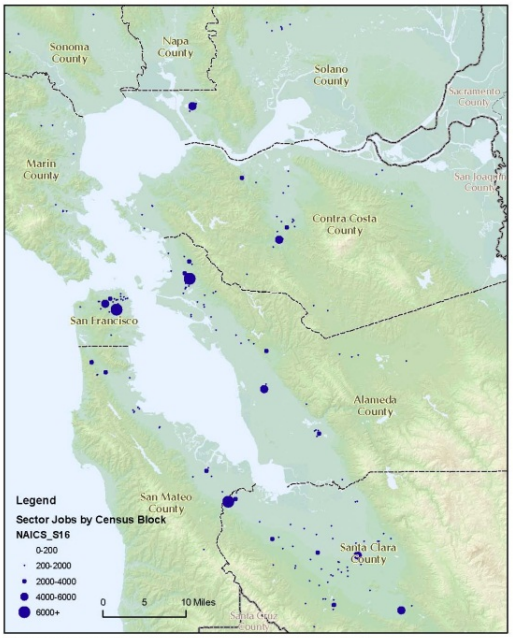
Source: ABAG, U.S. Census Bureau Longitudinal Employer Household Dynamics, 2008.
Only Census Blocks with at least 200 jobs are shown.

NAICS Sector 54:
Professional, Scientific, and Technical Services



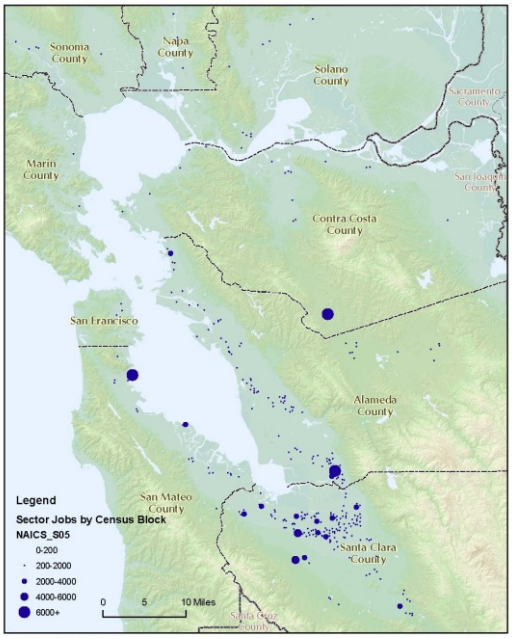
Source: ABAG, U.S. Census Bureau Longitudinal Employer Household Dynamics, 2008.
Only Census Blocks with at least 200 jobs are shown.

NAICS Sector 62: Health Care and Social Assistance



Source: ABAG, U.S. Census Bureau Longitudinal Employer Household Dynamics, 2008.
Only Census Blocks with at least 200 jobs are shown.

NAICS Sector 31-33: Manufacturing Jobs



Source: ABAG, U.S. Census Bureau Longitudinal Employer Household Dynamics, 2008.
Only Census Blocks with at least 200 jobs are shown.

Understanding how the industry sectors are growing was key to developing the Plan Bay Area regional growth forecast. The projected regional employment growth is based on national employment growth by industry sector and the region's share of that growth. By 2040, the region is projected to have approximately 4.5 million jobs and 3.4 million housing units, or an additional 1.1 million jobs and 660,000 housing units from 2010. It is important to note that the overall level of employment growth is constrained by projected housing production. While the projected level of housing production is ambitious, it still results in slightly lower employment growth than the region could potentially capture based upon its competitive advantage in high-growth industries.[7]

The region is forecast to grow slightly faster than the nation. Over half of the 1.1 million job growth is expected to occur between 2010 and 2020, which includes the recovery of close to 300,000 jobs lost since 2007. Many of these jobs will be filled by currently unemployed or underemployed individuals. From 2020 to 2040, the rate of job growth is forecast to slow down as retiring Baby Boomers exit the labor force.[8]

Table 1: Regional Totals, 2010 and 2040

	2010	2040	Growth
Population	7,151,000	9,299, 000	2,148,000
Households	2,608,000	3,308,000	700,000
Housing Units	2,786,000	3,446,000	660,000
Jobs	3,385,000	4,505,000	1,120,000

2.2 Innovation and diversity lead economic growth

The Bay Area exhibits strength in certain key economic sectors, particularly those directly involved in knowledge production, which provide the region with a competitive advantage over other regions. Other sectors, such as Health and Education and Leisure and Hospitality, make up a smaller portion of the job base but have exhibited steady growth, while some sectors, such as Manufacturing, have shrunk but provide a stable base of employment that support the overall economy. These trends form the basis of the employment forecast, which anticipates that these sectoral trends will continue.

By 2040, the leading sectors of the regional economy are expected to remain in knowledge production. This includes Professional Services, Information, Finance, and portions of the Health and Education sectors. Many companies in these sectors will continue to specialize on the design and development of new products and information, outsourcing the manufacturing and general professional services components. This knowledge production is supported by a highly educated labor pool and provides many high wage jobs. The Bay Area's labor force has the highest share of college graduates (44%) when compared to any other region in the country.[9] These leading sectors have represented and will continue to represent a high share of the total regional growth, accounting for over one third of total jobs. Although the knowledge-based sectors define the overall pace of growth for the region, their success is supported by and advanced by a very diverse regional economy.

[7] CCSCE/Stephen Levy. *Bay Area Job Growth to 2040: Projections and Analysis.* February 2012.
[8] Ibid.
[9] Ibid.

The Health and Education and Leisure and Hospitality sectors are expected to continue growing steadily, as they have in the past. Construction is expected to experience significant employment gains, particularly through the recovery period.

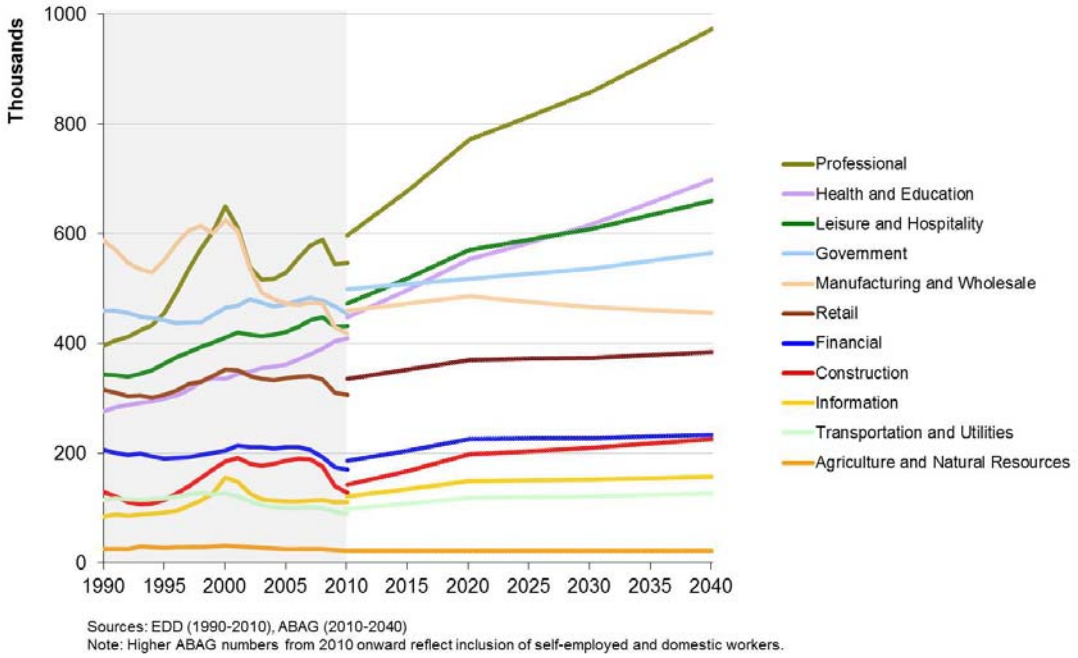
Manufacturing and Finance are not expected to contribute many jobs, but will remain stable sectors in the regional economy. The decline of manufacturing and finance employment has resulted in a loss of some middle-income jobs for the region. This is compounded by the expected continuation of polarized incomes between the highly specialized knowledge-based jobs and service jobs. Similarly, the agricultural sector—where food production is combined with high value tourism, organic markets, and farmers markets—has incorporated a wide range of services and exchange networks with a resulting higher productivity for many businesses, but the number of jobs in this sector is expected to remain the same or decline.

Table 2: Total Employment & Growth by Sector, 2010 and 2040

	Total		Growth
	2010	**2040**	**2010-2040**
Professional	596,700	973,600	376,900
Health and Education	447,700	698,600	250,900
Leisure and Hospitality	472,900	660,600	187,600
Government	499,000	565,400	66,400
Information	121,100	157,300	36,300
Transportation and Utilities	98,700	127,400	28,600
Financial	186,100	233,800	47,700
Construction	142,300	225,300	82,900
Retail	335,900	384,400	48,500
Agriculture and Natural Resources	24,600	22,700	-1,900
Manufacturing and Wholesale	460,200	456,100	-4,100
All Jobs	**3,385,300**	**4,505,200**	**1,119,900**

Source: Stephen Levy, ABAG

Figure 5: Employment Trends, Past and Future



2.3 Job growth concentrates in PDAs

The employment growth forecast and industry sector distribution syncs with the Priority Development Area framework for growth established by local jurisdictions and the regional agencies. The types of jobs forecast in the Jobs-Housing Connection Strategy correspond to and complement planned areas of employment growth in the PDAs, which are expected to capture 66% of overall employment growth.

In keeping with the growth objectives of the SCS, the forecasted employment pattern in the Jobs-Housing Connection Strategy builds upon the PDA framework to support recent trends toward job concentration, while also encouraging retention of agricultural and industrial employment opportunities and land. The PDAs are organized around transit corridors, thus linking job centers and housing, offering greater return on transit investment by promising greater ridership and preserving the region's open space.

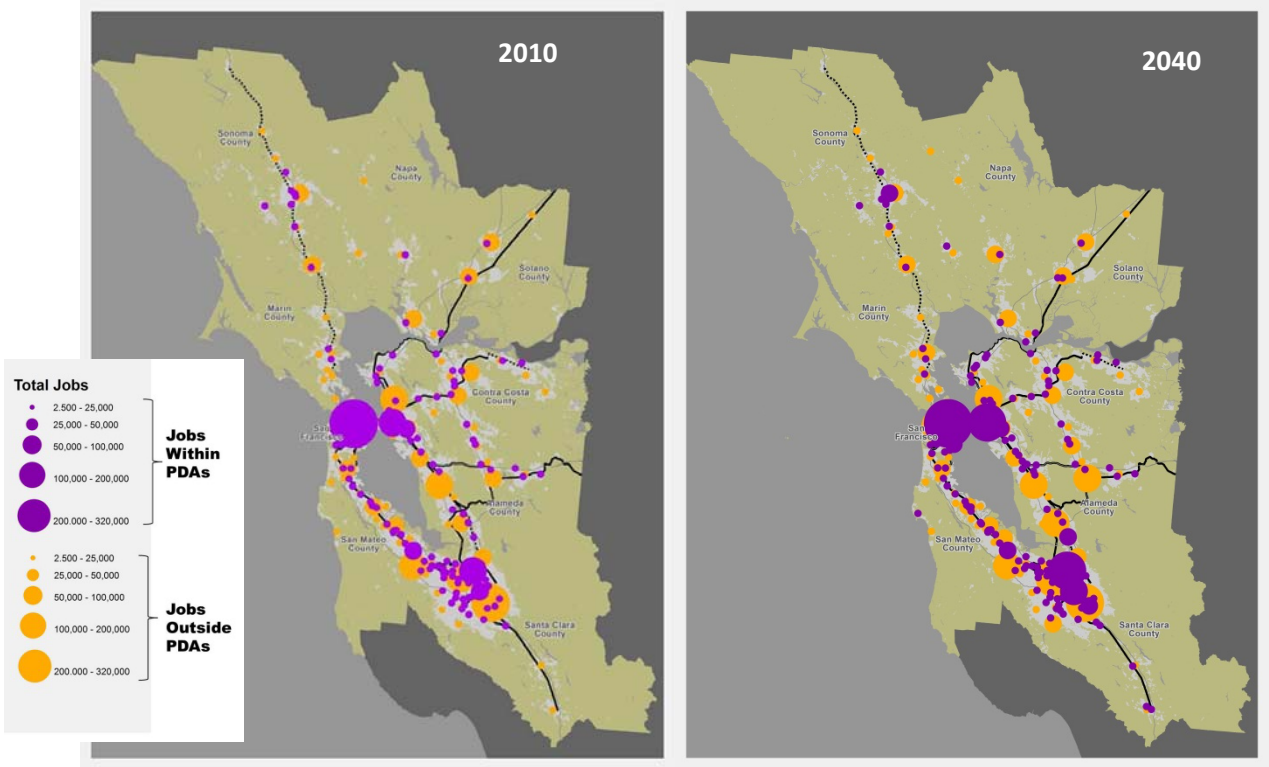
Based on an assessment of existing sectoral patterns of spatial concentration and recent job location trends the Jobs-Housing Connection Strategy identifies three major employment growth trends:

- Clustering of knowledge based sectors based on current spatial concentration, sector specialization, and past growth in particular areas of the region, as well as transit access and level of service

- Growth of local service sector employment around new housing. The Jobs-Housing Connection Strategy anticipates that the ten percent job growth in the Retail, Health & Education, and Construction sectors follows the proposed pattern of housing growth, which is expected to become more concentrated within the region's Priority Development Areas.

- Limited job growth in other sectors—Manufacturing and Wholesale, Agriculture, and Government—that follows existing patterns of employment in these sectors, both in terms of location and spatial concentration.

Figure 6: Job Location, 2010 & 2040



2.4 Employment nodes are strengthened, industrial and farmland retained

The spatial pattern of the employment forecast in the Jobs-Housing Connection Strategy builds upon the patterns of growth exhibited by the industry sectors, with different economic activities coordinating with each other across communities and along the transportation network to create an efficient regional economy.

The type of activities that businesses conduct varies by industry sector. Some sectors require more work in front of a computer, while others require use of heavy equipment or interaction with people. These activities dictate the space and facility requirements, building types, location, and transportation access for workers and products. In addition, each industry sector is comprised of a range of occupations, with people of varying knowledge and skills required to support the activities of a particular industry.

In general, the industry sectors can be grouped by the primary type of activity that they conduct. The five primary economic activities we have identified for the industry sectors are shown in **Table 4**. Each of these five economic activities exhibit distinct but related spatial patterns across the region in terms of clustering or dispersal of jobs, transit accessibility of these jobs by workers, and the locations for different types of occupations. Looking at the future spatial pattern of employment can help to inform the economic development strategies needed to support growth in each industry sector and to support the workers within those industries.

Table 3: Economic Activity Categories

Economic Activity	Industry Sectors
Office	Information Professional/Scientific/Technical Financial/Leasing
Retail & Services	Retail Health & Education
Civic & Cultural	Leisure & Hospitality Government
Industrial	Manufacturing & Wholesale Transportation & Utilities Construction
Agricultural	Agriculture & Mining

Maps 1-5 show the spatial distribution of employment within these economic activity categories in 2010 and 2040, illustrating the primary locations for each of these categories of employment.

Office Employment

Office jobs are located throughout the region in 2010, as shown in **Map 1**. However, there are several large office nodes of note, including the three regional employment centers—San Francisco, Oakland and San Jose, suburban centers such as Walnut Creek, Concord, and San Rafael, and corporate campuses of technology companies such as Google, Apple, and Facebook on the Peninsula and in the South Bay. Out of all jobs, the Information sector jobs tend to concentrate and cluster most along the region's key transit and transportation lines, and in the more densely developed areas of the region.

By 2040, office jobs are expected to be more concentrated in existing nodes, especially within the three regional centers and along the major transit networks, as shown in **Map 1**. This reverses previous trends of job dispersal through suburban office parks. Recent growth in these sectors within the regional centers has shown that these businesses are increasingly seeking to locate in close proximity to related firms, as well as to the amenities and services that workers are demanding, such as cultural and leisure activities, in order to attract talented employees.

Interest in regional centers among technology companies, in particular, is strong, but securing space meeting their spatial needs in a timely manner has hindered the ability of centers to meet this demand. The pace at which tech companies are able to develop products and scale up is typically much faster than the timeframe required to secure additional building space. Google, for example, has indicated that it would significantly expand its operations in Downtown San Francisco if it could identify, lease, retrofit, meet all regulatory requirements and move in to a space quickly. Part of this challenge stems from the different nature of the tech company workplace—which typically includes fewer walls and more natural light—than the workplaces of the financial and professional services companies that have traditionally occupied the bulk of space in regional centers, but are in many cases reducing the amount of space they lease. Another key factor is the need to adjust zoning and building standards to better accommodate these needs

Like regional centers, smaller centers are becoming increasingly attractive to knowledge-sector companies because of their access to the transit, amenities, and opportunities for face to face collaboration. In many

cases, however, the ability of these centers to attract tenants is constrained by the availability of inexpensive space in nearby office parks with limited or no transit access.

Retail & Services, Civic & Cultural Employment

Though not key drivers of the regional economy, Retail & Services and Civic & Cultural activities are closely linked to growth in the knowledge sectors and to the changing population, and are critical to the vitality of the region's neighborhoods. As noted, workers in the knowledge sectors are demanding more and better access to urban cultural amenities and services, such as restaurants, recreational opportunities, and art and entertainment. Furthermore, the aging population is expected to demand more health services in the coming years, and seniors, as well as the increasingly ethnic population of the region, are expected to demand more recreational, cultural, retail and health services in close proximity to their homes. By 2040, Retail & Services and Civic & Cultural employment is expected to be more concentrated in regional and suburban centers, in office parks, where they have been lacking to date, and to the main streets of small and mid-size downtowns in which housing growth is expected. The increased density of these sectors in PDAs by 2040 can be seen in **Maps 2** and **3**. It is clear that Retail & Services and Civic & Cultural activities follow a more multi-centered pattern in the region compared to office-based employment.

Industrial Employment

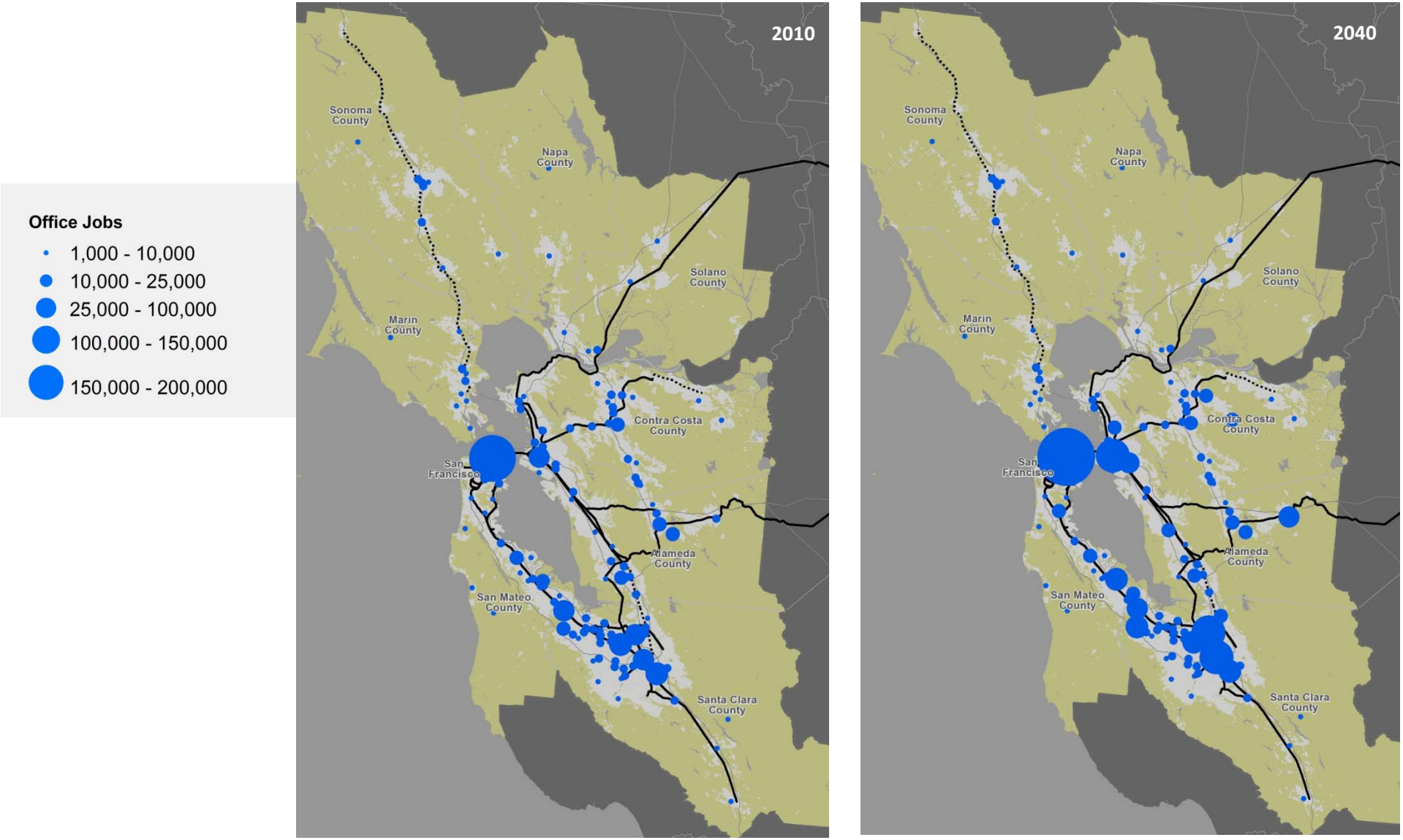
Like retail, service, civic and cultural activities, industrially-based jobs are not the key driver for growth in the region. However, the industrial sectors play a major role in the regional economy—providing career-ladder jobs that are typically more stable than those in other sectors, and expanding the diversity of the employment base in the region. The nature of industrial employment is changing, however, in terms of the types of economic activities in this sector, the scale of these activities, the spatial needs, and the occupational mix. Industrial activities in the region are no longer defined by smoke-stack driven, heavy industrial activities. More recently, the Bay Area has seen growth in smaller-scale, locally-based industrial activities, such as small artisan food processing businesses, that support basic retail, cultural, and other neighborhood-serving sectors. As **Map 4** shows, Industrial activity is expected to become less concentrated along the Peninsula, and more concentrated within the East Bay and a few nodes in Santa Clara County.

It is important to note that the strength of the Bay Area information economy and unmet housing demand has placed increasing pressure on industrial land. While conversion of some underutilized industrial areas can help meet the region's acute housing shortage, a stable supply of industrial land is critical to the basic operation and expansion of the Bay Area economy. Industrial land provides space for the food production, catering operations, and transit vehicle storage needed for successful centers, corridors and neighborhoods.

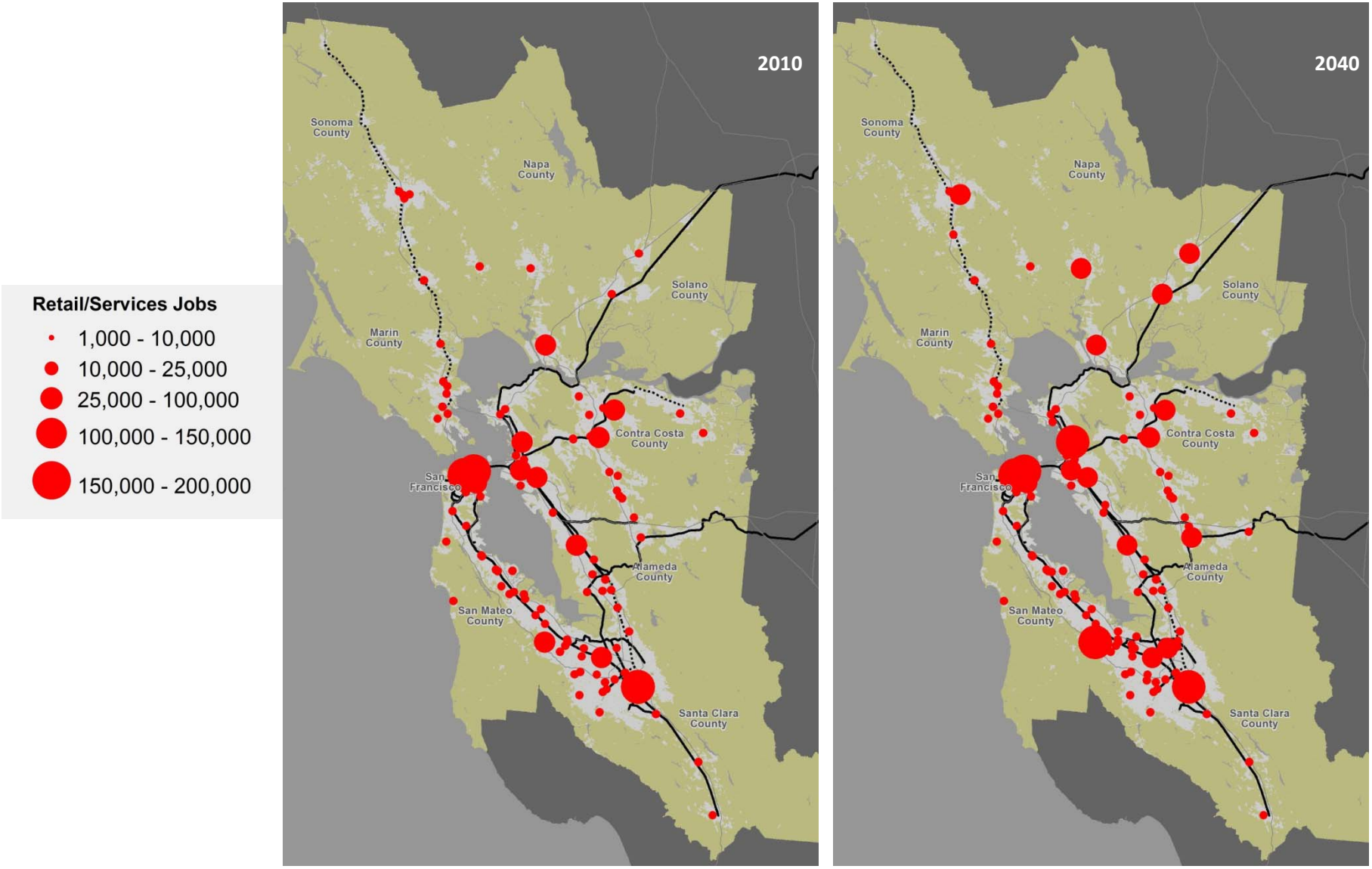
Agricultural Employment

Employment in Agriculture is expected to remain a small but stable part of the Bay Area economy. This sector has become increasingly diversified in its activities, with agricultural lands playing a large role in the local, sustainable food movement in the Bay Area, as well as a critical component in the tourism and hospitality industry, particularly in the region's celebrated wine industry. By 2040, it is expected that much of the existing agricultural lands will remain, with greater concentration of this type of employment in the North Bay counties.

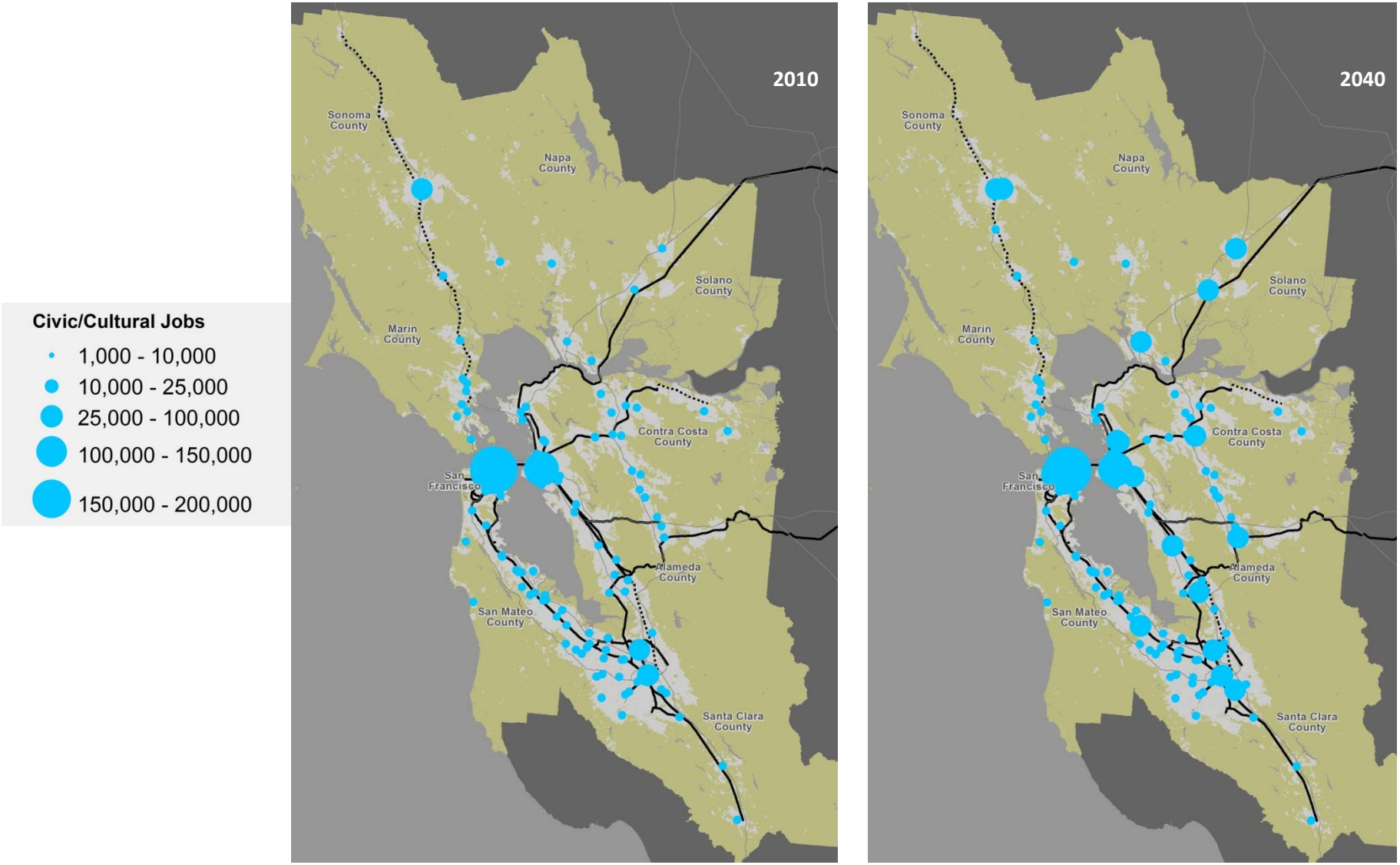
Map 1: Office Employment, 2010 & 2040



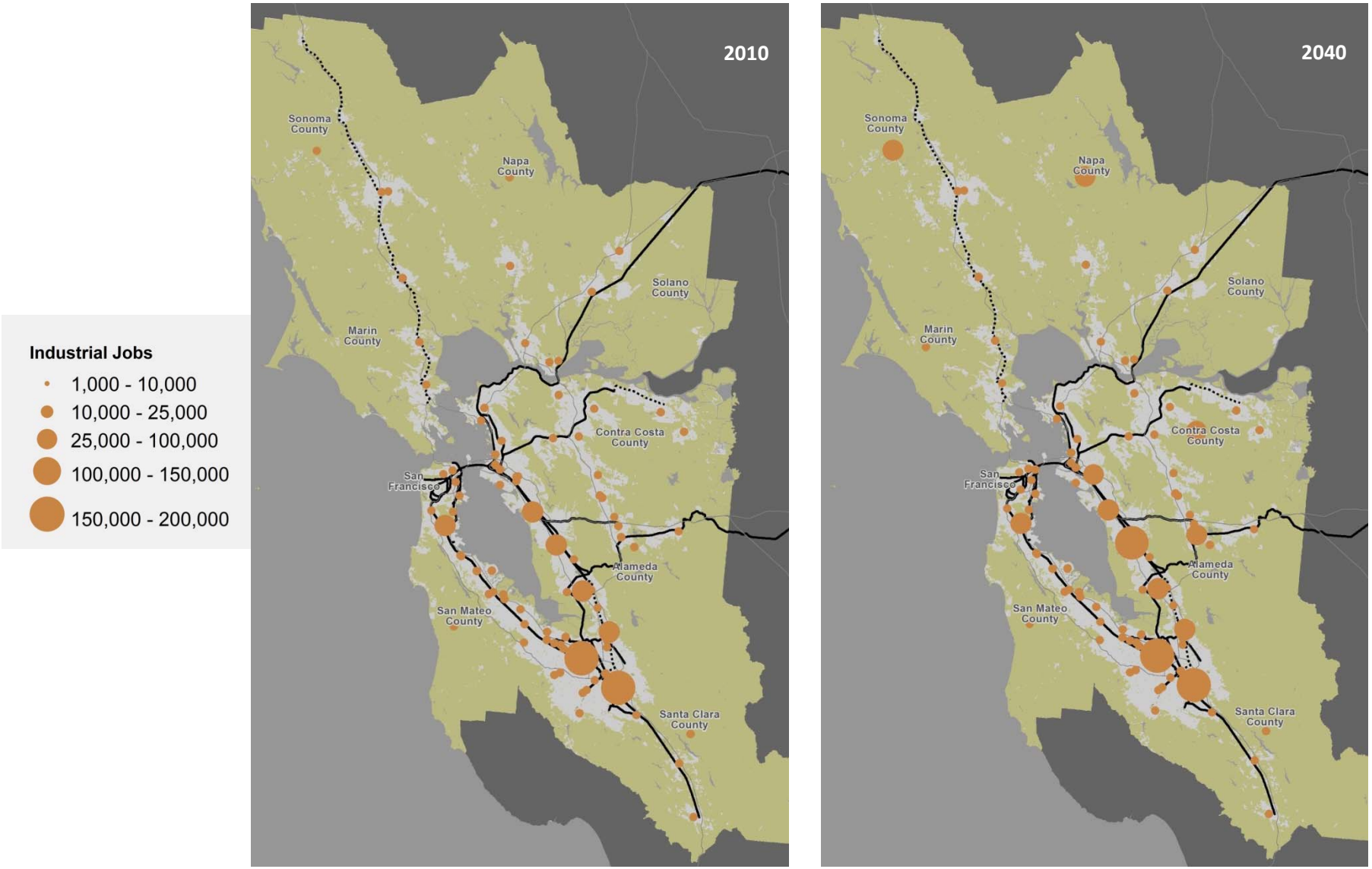
Map 2: Retail & Services Employment, 2010 & 2040



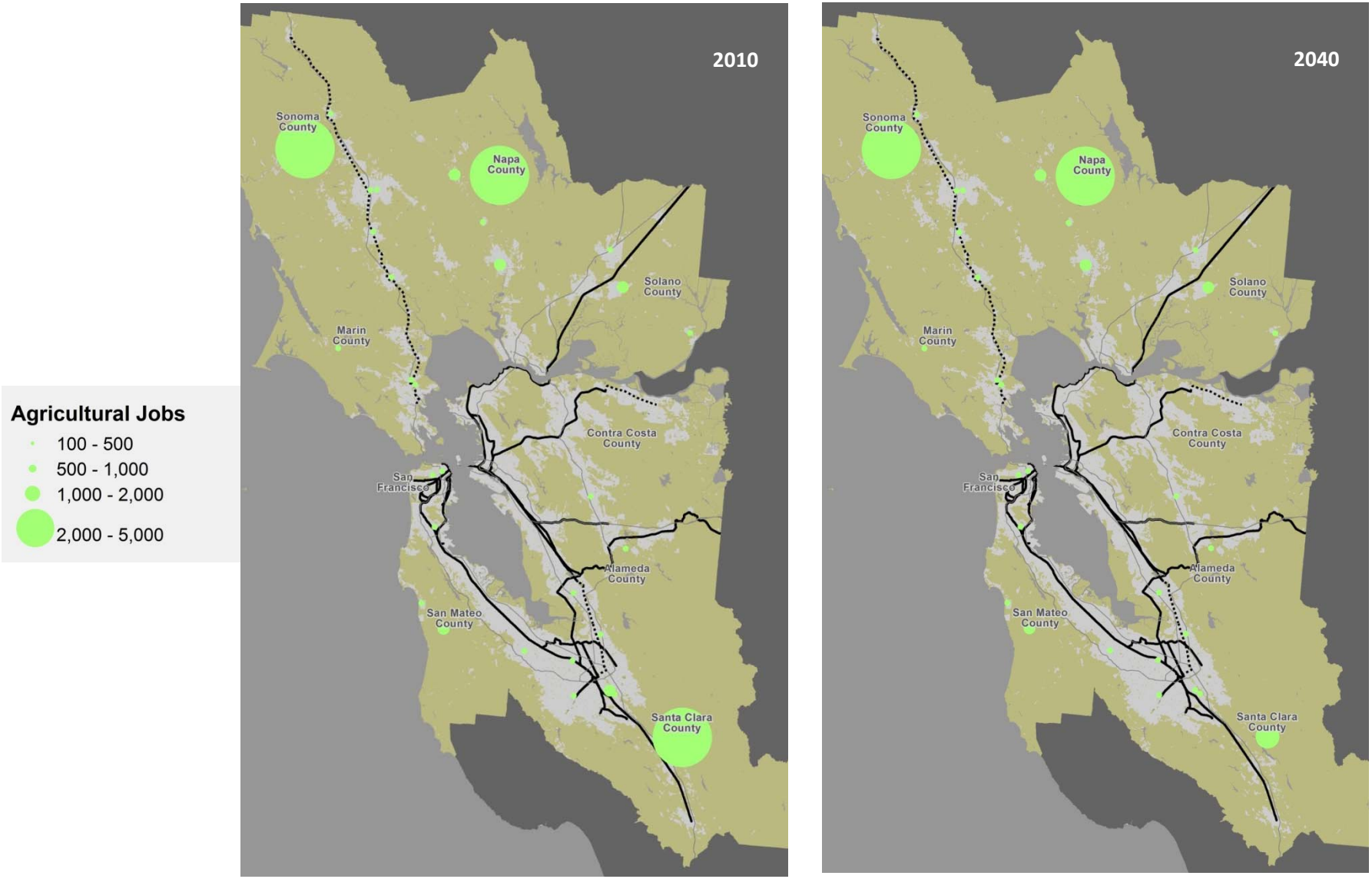
Map 3: Civic & Cultural Employment, 2010 & 2040



Map 4: Industrial Employment, 2010 & 2040



Map 5: Agricultural Employment, 2010 & 2040



2.5 Broad array of future occupations and wages

Each industry sector is comprised of a wide range of occupations. The range of occupations corresponds to the type of skills and training necessary to operate a business within a particular industry. The employment forecast is based on a regional economy composed of a range of industries with a diversity of occupations and wages, which ultimately provide opportunities for workers of all skill levels.

The expected occupational composition in 2040 for each economic activity is illustrated in **Figure 7.** The occupations are grouped based on occupational classifications used by the US Bureau of Labor Statistics (BLS) and the California Economic Development Department (EDD) as noted in **Table 5**. Looking at the occupational make-up of the economic activity groupings helps to shed light what types of wages can be expected for different industries. Overall wage levels for each economic sector are illustrated in **Figure 6**.

Table 4: Occupational Categories

Occupational Categories	California EDD Occupational Classifications
Management and Legal	- Management - Legal
Computer, Engineering, Science	- Computer and Mathematical - Architecture and Engineering - Life, Physical, and Social Science
Business and Financial Operations	- Business and Financial Operations
Healthcare Practitioners, Arts and Entertainment, Education, Sales	- Healthcare Practitioners and Technical - Arts, Design, Entertainment, Sports, and Media Occupations - Education, Training, and Library - Sales and Related - Community and Social Services
Office and Administrative Support	- Office and Administrative Support
Construction, Maintenance and Repair, Production, Transportation	- Installation, Maintenance, and Repair - Construction and Extraction - Production - Transportation and Material Moving
Building Cleaning, Maintenance and Security, Other	- Protective Service - Building and Grounds Cleaning and Maintenance - Healthcare Support - Personal Care and Service - Farming, Fishing, and Forestry - Food Preparation and Serving-Related

While one might expect that the **Office** activities would be comprised primarily of the higher-skill, higher-wage occupations, in general, these sectors have a fairly even distribution of occupations that span all wage levels. In total, the Management & Legal, Computer, Engineering, & Science, and Business & Financial Operations occupations account for a total of 33 percent of all Office-based jobs. Twenty-four percent of employment in this economic activity group is Office & Administrative Support jobs, and sixteen percent are in Building, Cleaning, Maintenance & Security jobs.[10]

Conversely, **Retail & Services** employment is comprised primarily of middle- and lower-wage occupations. These include: Healthcare Practitioners; Arts & Entertainment; Education; Sales; and Building, Cleaning, Maintenance, Security, & Other jobs—which includes personal care, healthcare support, and food preparation. These occupations make up 37 and 43 percent of **Retail & Services** employment, respectively.

Key **Civic & Cultural** occupations include the sales-related jobs within the Leisure & Hospitality economic sector, particularly tourism-related occupations, as well as community and social services jobs

and protective-services jobs within the Government economic sector. A range of wage-levels are represented by these industry sectors.

As would be expected, the key occupations within the **Industrial** sectors include Construction, Maintenance, Repair, Transportation, & Production work, making up 59% of all employment in these sectors. These occupations range primarily from low- to middle-wage jobs, as illustrated in **Figure 6**.

The primary **Agricultural** occupations include farming, fishing and forestry jobs, which are reflected in the Building Cleaning, Maintenance & Security, & Other occupational category, which makes up 36 percent of Agricultural employment. It is important to note that the **Agricultural** economic activity grouping includes the Mining & Natural Resources sector, so it is likely that the bulk of the Management & Legal occupations within this category reflect jobs within the headquarters of Chevron and other resource-related companies.

Figure 6: 2010 California Employment Distribution by Sector and Income

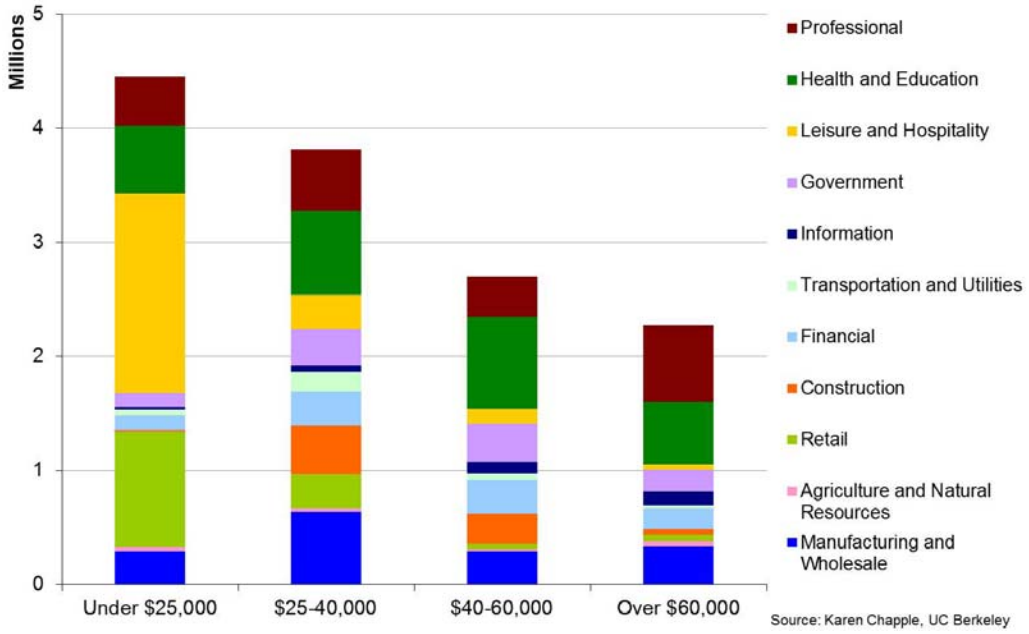
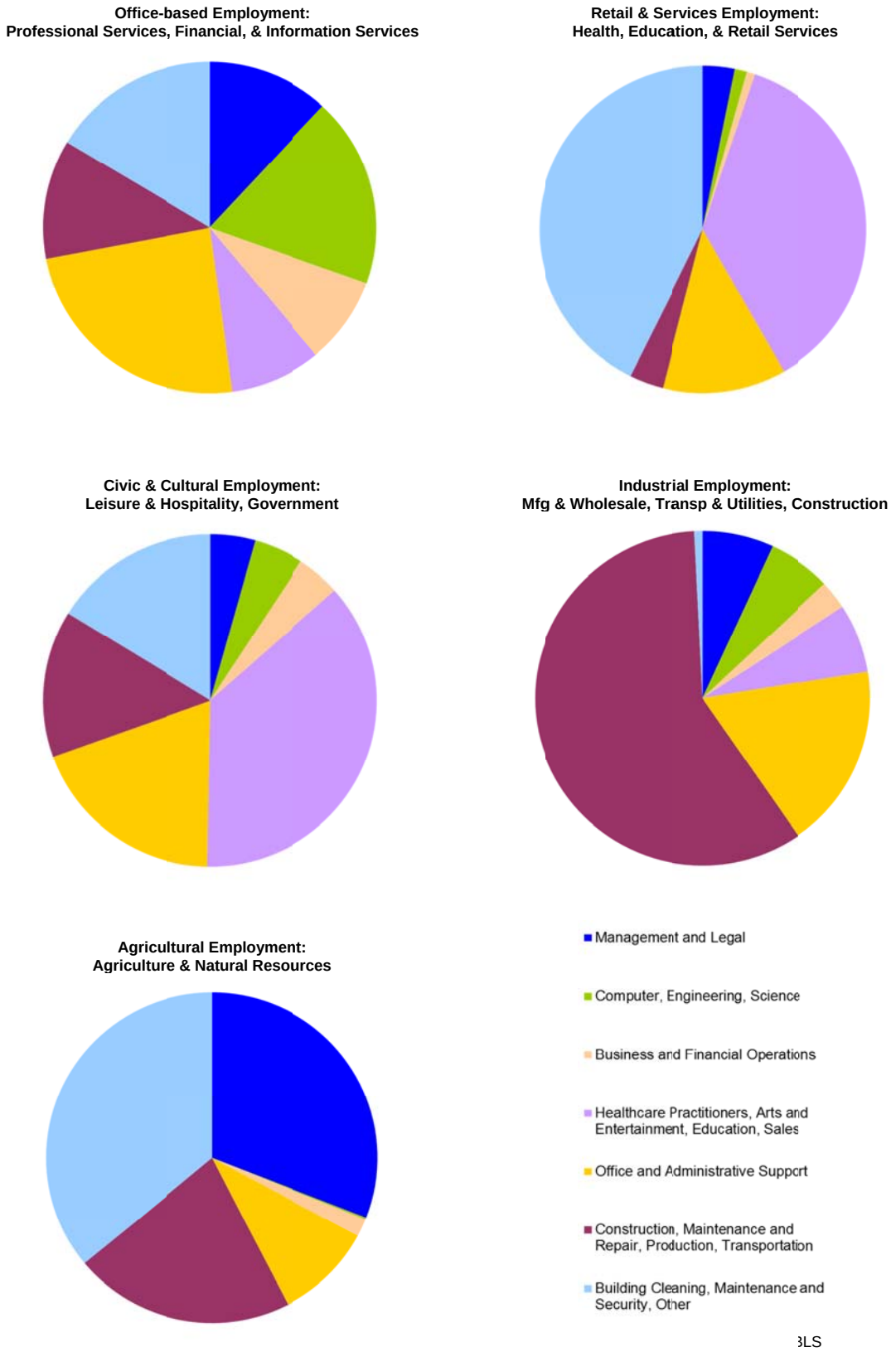


Figure 7: Bay Area Occupations by Economic Activity (Sector Groupings), 2040



Tying occupations back to the spatial distribution of these economic activities, one can begin to identify where within the region industries of opportunity are expected to grow and concentrate, and to see how connected these jobs are to the regional transportation network. Further analysis of occupations and wages can help to identify specific industries of opportunity that HUD Regional Prosperity Plan will be working to support.

3. Regional Economic Issues and Challenges

The Bay Area faces numerous threats to long-term prosperity. This section highlights key issues for consideration in the development of near-term strategies and in the coordination of regional economic development over the medium- and long-term. This includes both spatially oriented issues related to the implementation of the Plan Bay Area job growth pattern, and issues related to policies linked to, but not directly addressed, in the Plan and in this paper.

Key region-wide economic development issues include:

- Housing production and affordability. To achieve the level of economic growth projected over the next 30 years, the region must produce an adequate supply of workforce housing. The ABAG Housing Policy Background Report projects that without policy intervention, the region is likely to produce 250,000 fewer very low, low and moderate income units than necessary to accommodate our projected future workforce. This could significantly constrain the number of new jobs in the Bay Area over this period, while also reducing the spending power of low and moderate income households. A recent report by the Bay Area Council Economic Institute[11] found that sufficient housing and housing affordability is a competitive disadvantage to attracting businesses and growing jobs in the Bay Area—a finding echoed in this report and numerous other analyses.

- Education and workforce development. The region is expected to produce a high percentage of both knowledge-based jobs and middle-skill jobs in industries such as health care with career ladder opportunities. Access to a highly trained workforce is among the region's greatest economic strengths, but the Bay Area lacks qualified workers for the full range of jobs in these industries, especially middle skill occupations. Some of this is related to a shortage of affordable housing, but our K-12, university, and workforce training systems also play an important role. As federal and state efforts focus on improving K-12 performance, the Regional Prosperity Plan is identifying industries of opportunity to help coordinate investment and technical training. Implementation will involve regional partnerships among jurisdictions, Workforce Investment Boards, economic development organizations, unions, community colleges, and state and federal agencies.

- Low wage workers and low-income households. The national and regional long-term trend toward economic inequality is projected to continue into the future. As figure 6 in section two illustrates, nearly one-third of Bay Area workers are projected to be employed in jobs with current incomes of less than $25,000.[12] This has significant implications for housing, social services, community cohesion, and the local economies of distressed downtowns and neighborhoods—which are increasingly located at the outer edges of the region and supported by a consumer base with limited spending power. As strategies are developed to improve access to middle wage jobs, meeting the

[11] Bay Area Council Economic Institute, 2012, *The Bay Area: A Regional Economic Assessment*
Link: http://www.bayareaeconomy.org/media/files/pdf/BAEconAssessment.pdf
[12] In 2010 dollars.

basic needs of a growing low-income population and addressing community disinvestment is critical to the health of the regional economy.

- Spatial needs of emerging economic sectors. As section two indicates, the spatial requirements of knowledge industry businesses and artisanal retail and industrial businesses are different than the businesses for which current zoning and building codes were written. This is also increasingly the case for agricultural industries seeking to expand value added activities on farms. Strategies to accommodate these businesses in centers, corridors, and industrial and farmland are critical to the long-term success of PDAs and the region's economy.

- Transit Accessibility of Job Locations. Focusing jobs around transit makes the Bay Area a more attractive place to live while also increasing access for low-income households and putting the region on track to implementing our greenhouse gas reduction target. The PDA-focused development pattern in Plan Bay Area will require adequate transit capacity is needed to sustain growth. The region has made significant investments in transit facilities in Regional Centers over the next 30 years, but ensuring a vibrant competitive economy will require monitoring over time to maintain this capacity. At the same time, as new jobs cluster around transit, many existing Bay Area workplaces will remain beyond walking distance of transit. In these locations, creative approaches and place-based solutions such as those discussed in the next section are critical to leveraging our transit infrastructure and enhancing access for low-income workers.

- Involvement of leading knowledge sector businesses in regional and local issues. Many of the region's leading companies are equally or more connected to discussions regarding national and international issues than to discussions about regional and local issues. While this reflects their prominence in the global economy, stronger engagement on issues such as housing, labor force training, and placemaking can benefit both the region and our leading companies. To reinforce this increased communication, regional agencies and local jurisdictions can expand outreach to knowledge sector businesses to ensure that their perspective is included in planning processes. A first step toward this is the current involvement of a regional business coalition in efforts by the Joint Policy Committee to explore a comprehensive approach to regional economic development.

4. Economic Development Priorities and Strategies

The economic development strategies introduced for discussion in this paper focus on the places that make up the region's economic network— the centers, corridors and neighborhoods in which jobs are located, new technologies are cultivated, and people are educated and live. This approach reflects the emphasis on land use and transportation in Plan Bay Area and ABAG's unique role in coordinating land use planning to create a sustainable growth pattern. The priorities and strategies draw upon the wealth of feedback received during the Plan Bay Area process and recent efforts from across the region, including city and county economic development plans, analyses of regional competitiveness, and strategies developed by non-profit and business organizations.

Moving forward, successful regional economic development planning will require close coordination between Plan Bay Area implementation and the multiple ongoing efforts in the region. Through Plan Bay Area and the HUD-funded Regional Prosperity Plan, the region has brought together a broad spectrum

of private, public, and non-profit stakeholders, setting the stage for integration of region-wide actions focusing on housing, infrastructure, workforce, business engagement and resiliency issues with the place-based priorities and strategies proposed in this section.

4.1 Place-Based Priorities

The Bay Area increasingly operates as an interconnected economy linked by cultural, financial and infrastructure networks. Each part of the network has a unique role in the regional economy, ranging from centers in which office and retail jobs cluster around transit hubs to agricultural areas protected from urban development. The overwhelming majority of the region's job growth results from new businesses created inside the region and the expansion of these companies within the Bay Area. The vitality of our economic ecosystem depends upon the quality and integration of the places in which learning, information exchange, research and product development, retail sales, and other parts of daily life take place.

At a general level, the areas of the region in which economic activity take place can be divided into five broad categories: Centers, Corridors, Neighborhoods, Industrial Land, and Farmland. The groups of places within each category contain incredible diversity, reflecting internal and external factors. The priorities and strategies proposed for different places emerge from local plans and Plan Bay Area. Figure 8 illustrates the relative concentration of the activities outlined in the previous section (e.g. office, retail and services, etc) in these places.

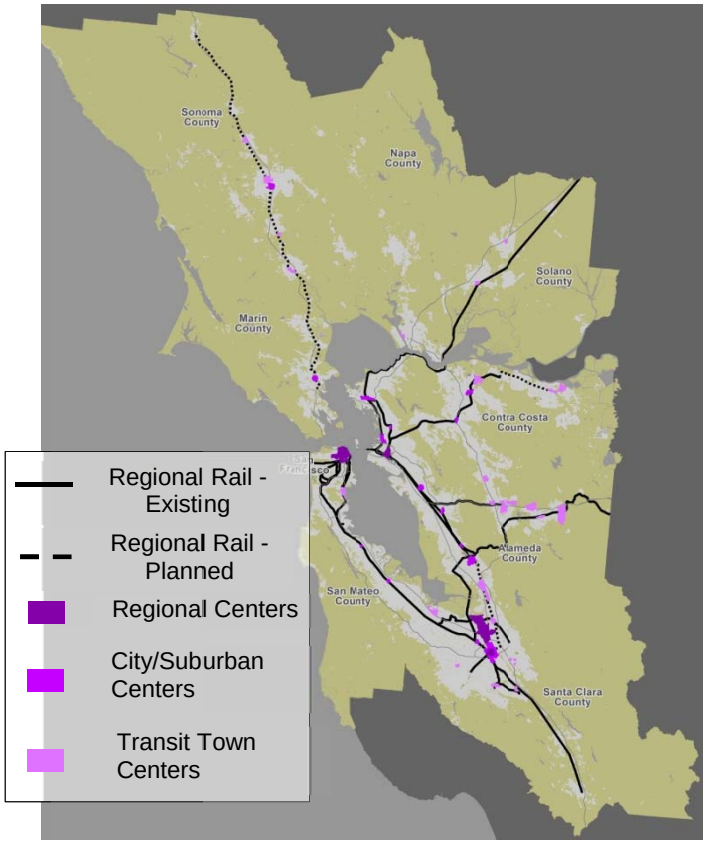
Figure 8: Concentration of Economic Activity Grouping by Place

	Office	Retail + Services	Civic + Cultural	Industrial	Agricultural
Centers					
Corridors					
Neighborhoods					
Industrial Lands					
Farmlands					

Centers

Centers are highest-density concentrations of economic activity in the region. In Plan Bay Area, centers designated by local jurisdictions are expected to attract nearly half of the region's new office jobs, as well as a significant amount of new retail and civic/cultural space to serve employees and growing residential populations. Three groups of centers are discussed below: Regional Centers; City, Suburban, and Transit Town Centers; and Office Parks. The first two groups are related to adopted PDA Place Types; the vast majority of office parks are not identified as PDAs (due in part to a lack of transit access), but are highlighted because of their important role in the regional economy.

Figure 9. Centers



Regional Centers

Regional Centers are the economic and cultural hubs of the Bay Area: the downtowns of San Francisco, Oakland, and San Jose. In addition to anchoring the Bay Area economy, they are linked to the national and international economies. They are served by highest levels of transit, and are the focus of a host of future investments—including the Transbay Terminal in San Francisco, capacity improvements to East Bay BART and AC Transit service, and enhancements to Diridon Station that will accommodate high speed rail and the extension of BART service to San Jose. Federal, state and local government offices are also focused in the regional centers.

As discussed in section two, regional centers are anticipated to expand their roles as dense clusters of office jobs, particularly activities in the knowledge sectors—reflecting a growing preference among workers and employers for urban amenities, transit access and dense networks of knowledge exchange. Regional centers are also projected to accommodate a significant amount of new housing. This will increase the hours of activity and help make local businesses providing both basic services and niche industries more viable. Evidence of this diversification is already evident in the boom in new apartment construction in areas such as San Francisco's South of Market and the growth of clusters for cultural activity such as Oakland's Uptown. The presence of specialized local food, retail, and entertainment establishments plays an important role not only in attracting new residents, but also in attracting office tenants from the tech and creative sectors. Combined with transit and a commitment to sustainability, proximity to restaurants and bars has been cited by businesses leasing office space in Downtown

Oakland.[13] In addition to accommodating new office tenants, meeting the spatial needs of local entrepreneurs to experiment and expand is an important part of creating vibrant centers.

Potential Priorities for Regional Centers include:

- Meet the spatial needs of growing knowledge-sector firms attracted to regional centers, in particular tech companies. This may involve adjusting zoning and building codes; refining review processes and fees; and ensuring that adequate land exists to facilitate future expansion.
- Support and expand "social infrastructure" such as cafes, restaurants, and places that facilitate collaboration and have been shown to contribute to innovation and clustering. This may involve refining regulations, or drawing upon successful efforts in other parts of a center or another part of the region.
- Provide space for incubating start-ups focused on culture, food, and other specialized activities by leveraging publicly owned buildings or public spaces , or by partnering with private companies and non-profits (for example, Macy's provided free workspace to an SF Fashion Incubator supported by the SF Center for Economic Development).

City, Suburban, and Transit Town Centers

City, Suburban, and Transit Town Centers are current and projected centers of economic activity for medium-sized cities and clusters of smaller cities designated by local jurisdictions. These centers are within walking distance of convenient fixed route transit, including BART, CalTrain, Sonoma Marin Area Transit (SMART), Capitol Corridor, and light rail or express bus service. Some of the centers, particularly those in Silicon Valley, are home to the headquarters of a handful of companies that are integrated into the international economy. Other centers provide support services for companies with headquarters elsewhere in the Bay Area or outside of the region. Many of the centers are historic downtowns with local services, government headquarters and cultural activities, while others only contain commercial office buildings but are planned for a greater diversity of land uses.

Like Regional Centers, this group of centers is increasingly attractive to knowledge-sector companies because of their access to the transit, amenities, and opportunities for face to face collaboration. In addition to employment growth, the centers are anticipated to accommodate more than a quarter of the region's new homes in a variety of housing types ranging from mid-rise apartment buildings to rowhouses and small lot single family houses. This growing residential population is expected to support commensurate increases in civic, cultural, and retail services—in many cases helping make centers more complete.

Potential Priorities for City, Suburban and Town Centers include:

- Focus public buildings and investments in centers, in particular immediately around transit, to help create critical mass and support local businesses. This can be accomplished by enhancing coordination among city, county, school and special districts, or through the adoption of policies.
- Expand opportunities for local businesses to develop, market, and sell products within centers. This can involve increased use of public spaces for farmer's markets and temporary vending, as well as coordinating the use of public or private buildings by "pop up" businesses for a designated period of time, and outreach to local residents in multiple languages. These approaches can be linked to community development efforts that provide financial and other assistance to local businesses.

[13] Fast Company, 5/1/12, "Why Startups Hella Love Oakland."
Link: http://www.fastcompany.com/1836098/why-startups-hella-love-oakland

Successful businesses looking to expand operations should be connected to building owners and others with vacant building space along retail streets in the center that is for lease on a long term basis.
- Revise zoning and building codes as needed to meet spatial requirements of tech and other growing industries.

Office Parks
Office Parks are single-use districts of commercial office buildings, typically with low densities and convenient highway access. Occupants vary widely across the region, from dentist and doctors' offices to campuses for major companies such as Google and Oracle.

Several office parks with excellent regional transit access, such as Hacienda Business Park adjacent to the Dublin/Pleasanton BART station, were designated future City and Suburban Centers by local jurisdictions. A number of office parks with local transit access were designated Employment Investment Areas –which are anticipated to remain predominantly single-use, but to integrate new daytime services such as restaurants, gyms, and pharmacies, as well as improved pedestrian facilities.

While office parks are not targeted for intensive growth, they will remain a primary land use in some parts of the region. Office parks experiencing high levels of vacancy are being converted to residential use in some places, and can help accommodate the growth of companies that need industrial space not suitable for centers. Diversifying the land use mix and level of pedestrian, bicycle, and transit access to workplaces in office parks is an important part of achieving the region's GHG emissions reduction targets.

Potential Priorities for Office Parks include:

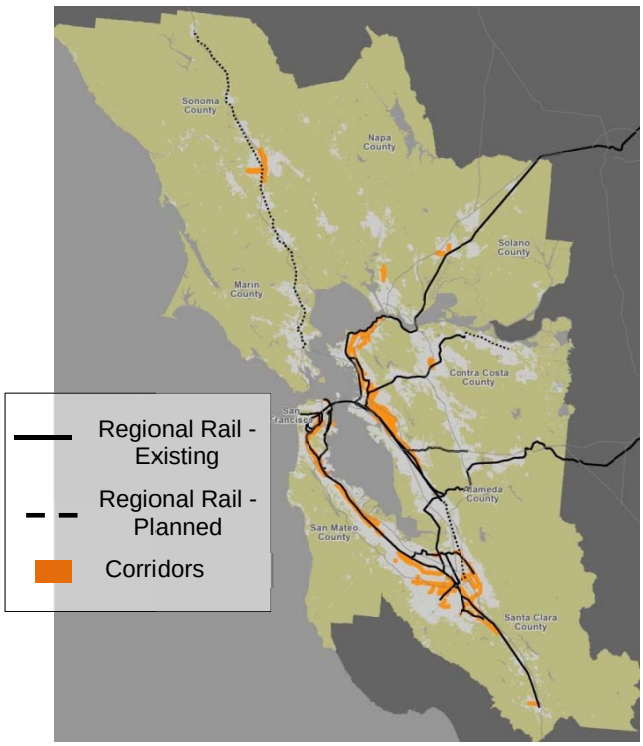
- Diversify land use mix through planning and infill development that adds services that support daytime population.
- "Last mile solutions" to increase access to workplaces from transit stations beyond walking distance of office parks (e.g. shuttle service, bike and electric vehicle sharing), and improvements to pedestrian environment within office parks.
- Increase flexibility of vacant and underutilized office space to accommodate uses that are not transit supportive but support growing sectors of the region's economy—such as light manufacturing.

Corridors
Corridors are linear districts along major arterials such as El Camino Real/Mission Street, San Pablo Boulevard, and Stevens Creek Boulevard. Corridors provide retail and professional services for surrounding neighborhoods, but in some cases also include clusters of specialty food, cultural and retail uses. Some corridors are already served by rail or rapid bus; frequent service in dedicated rights of way is planned for most of the others. Jurisdictions are working collaboratively to transform the auto-oriented portions of corridors into mixed-use environments with complete streets that balance the needs of pedestrians, bicycles, transit vehicles with smooth traffic flow. In recent years, the Grand Boulevard Initiative has brought together the public and private sectors of communities along El Camino Real in San Mateo and Santa Clara County to establish a common vision. The participation of these parties helped create a model for collaboration that can be extended to other corridors in the Bay Area.

Potential Priorities for Corridors Include:

- Coordination between cities, business communities, transit agencies, and the California Department of Transportation (CalTrans) to align planning and design efforts along corridors that cross jurisdictional boundaries, building upon the Grand Boulevards Initiative. Regional agencies can help facilitate resolution of implementation challenges related to CalTrans standards.

Figure 10. Corridors



- Identify and implement creative approaches to redeveloping strip malls and underutilized commercial buildings with deep setbacks from the public right-of-way. This can draw upon successful regulatory practices in cities such as Emeryville. This should be coupled with efforts to retain small businesses serving the unique cultural needs of surrounding communities.
- Support development and expansion of small businesses, and facilitate the use of underutilized public and private buildings for "pop ups". This can involve outreach to cultural and social networks in communities surrounding corridors.

Neighborhoods

Limited change is expected in the vast majority of Bay Area neighborhoods. Some jurisdictions have identified residential areas within walking distance of transit for new housing and supportive services as PDAs. These supportive services are expected to provide opportunities for new small businesses—the scale and variety of which varies between Urban Neighborhoods around regional centers to Transit Neighborhoods in places with frequent transit service but a less urban character.

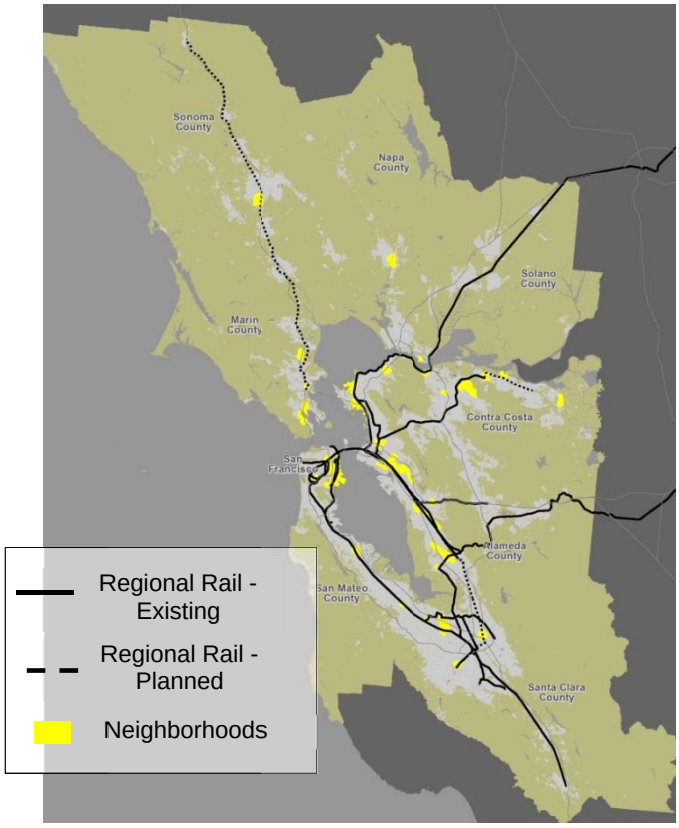
Home-based businesses, which are sprinkled throughout neighborhoods, have an important role in the regional economy; inventions in garages and kitchens have gone on to create thousands of jobs and reshape entire industries. In Urban and Transit neighborhoods, home- based and existing local businesses

are expected to be complemented by a wider array of services, including public facilities to meet the needs of a growing population.

Potential Priorities for Neighborhoods include:

- Increase installation of solar panels, graywater systems, electric vehicle charging capacity and other green technologies by reviewing city standards and coordinating with providers. This should target homes as well as publicly owned facilities. This approach can reduce household costs while also

Figure 11. Neighborhoods



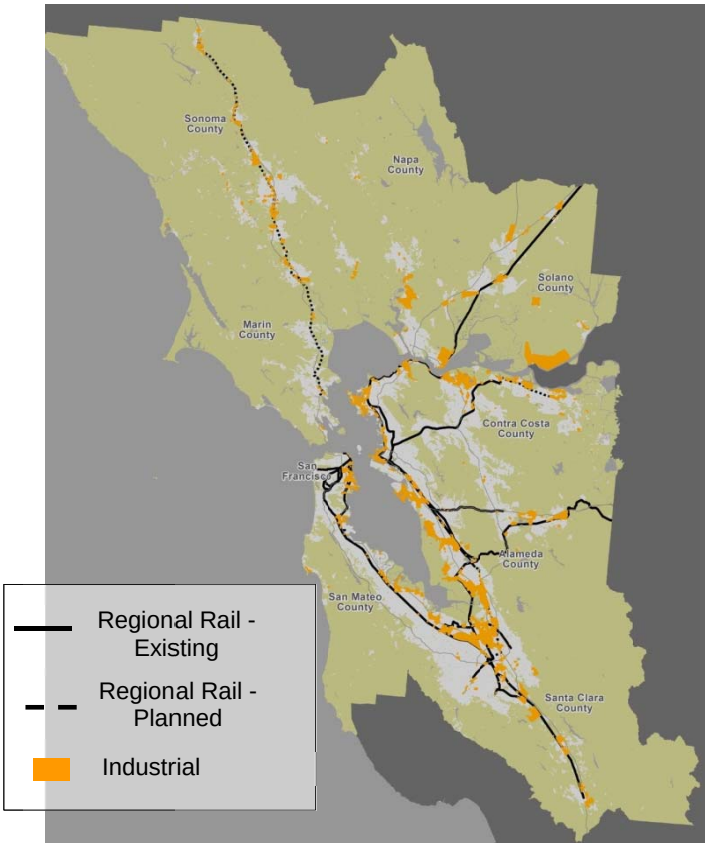
supporting green industries located in the region's centers, corridors and industrial area.
- Outreach to home-based businesses seeking space to introduce products and expand operations in surrounding communities. Connect these businesses to public and private parties offering space on a temporary or permanent basis.
- Support retention of small businesses that reflect the unique culture and lifestyle of communities within a neighborhood.

Industrial Land

Industrial land is distributed throughout the Bay Area, typically in close proximity to highways, rail corridors, and ports. The range of activities taking place on industrial land continues to diversify, with small scale operations such as coffee roasteries joining more traditional manufacturing and warehousing. Industrial land provides space for the food production, catering operations, and transit vehicle storage needed for successful centers, corridors and neighborhoods. Industries expected to provide additional

career ladder job opportunities and support the green economy, such as electric vehicles and renewable

Figure 12. Industrial Land



energy, also often require industrial space to develop products and scale up operations.

Priorities for industrial land vary across the Bay Area, reflecting access to transportation networks, land values, economic clustering, and labor markets. For example, industrial land in much of Sonoma County supports the agricultural sector, while vacant and underutilized land in parts of Solano County, such as Mare Island, is being converted to a growing cluster of green manufacturing activities including electric vehicles and energy-efficient prefabricated homes. These locations are attractive because they are less expensive, accessible by shipping channels, and still within driving distance of Silicon Valley. In the South Bay and parts of San Francisco, in contrast, close proximity to research and development lead to a greater emphasis on high-tech and bioscience activities. In other parts of the region, such as Emeryville and South of Market in San Francisco, smaller scale artisan manufacturing and cultural activities occupy a significant amount of industrial land.

Potential Priorities for Industrial Land include:

- Identify and protect strategically important industrial land, drawing upon best practices from within and outside the region.
- Increase the ability of growing Bay Area companies—particularly those in the Clean Technology sector—to rapidly identify and acquire space for scaling up operations.

- Develop strategies for preserving land for activities necessary to the functioning of centers, such as vehicle storage and food distribution, that may face difficulties paying increasing rents in places proximate to centers.
- Address employee access to workplaces without transit—in particularly for industries of opportunity identified as part of the Regional Prosperity Plan.

Farmland

The Bay Area's farmlands result in over $1.8 billion of crop production value annually and generate nearly 25,000 jobs—including 8.2% of jobs in Napa County and 3.7% in Sonoma County.[14] The region's agricultural industry creates a Bay Area "foodshed" that includes access to fresh produce, greater security as climate change effects the stability of production worldwide, and a strong rural economy. Farmlands offer additional economic benefits through the activities that accompany agriculture, such as food processing, specialized food and wine products, and food-related tourism. Farmland also contributes to the unique character of the Bay Area that continues to attract new residents and is a contributing factor to the selection of the region by company founders. Agricultural land is an integral part of the region's infrastructure network, dependent on road and rail access to markets within the Bay Area's urban areas and outside of the region. Farmland also supports the region's watershed by allowing water infiltration into the groundwater storage system, contribute to flood control, and absorb greenhouse gas emissions. As the industry evolves, many farms will benefit from streamlining the process for adding commercial kitchens and other facilities that support value-added activities.

Potential Priorities for Farmland include:

- Renew and strengthen policy protections for agricultural land
- Update land use standards for farmlands to permit (where appropriate) value-added activities and facilitate successful continued operation
- Invest in strategic "farm to market" projects that improve the ability of farmers to efficiently transport produce to processing facilities and directly to customers

4.2 Implementation Strategies

This section proposes strategies that ABAG can coordinate to achieve the economic growth pattern envisioned in Plan Bay Area and enhance the capacity of the region's jurisdictions to expand the opportunities available to their residents. The strategies respond to the challenges discussed in this paper and the unique role of ABAG in empowering Bay Area cities and towns to overcome these challenges, as well as ABAG's role as a convener of public, private and non-profit stakeholders.

Strategy One: Model Codes for the Future Economy

Many of the Bay Area's emerging industries and promising small businesses want to locate in PDAs and expand operations within the region, but need different kinds of workspaces and business environments than the companies for whom existing zoning, building codes, and other standards were written. With the continued reduction in the amount of space required by professional services and other traditional office tenants and the growing demands of innovation-driven companies, meeting these needs is critical to creating vibrant PDAs and supporting the overall regional economy. Meeting changing spatial needs is

[14] Crop Reports, Bay Area Counties, 2010 and 2011; US Census 2010

equally important for accommodating local entrepreneurs seeking to sell unique foods and services, supporting successful small farms, and retaining industrial activity as it evolves. At the same time, the region's jurisdictions must ensure that these emerging industries enhance the communities and public realms in which they are located.

To meet this challenge, ABAG can coordinate an effort to create model codes for attracting and successfully integrating growing economic activities into PDAs and other areas targeted for jobs. Model codes are based upon successful examples throughout the region and state, and allow jurisdictions to adjust their zoning ordinances, building codes, or other regulations at lower cost and greater probability of success. The codes would address a variety of emerging activities—such as tech company offices, temporary retail space, research and development, vending districts, and green manufacturing—and would be tailored to the levels of density in different kinds of PDAs and business districts. Codes would also take into account multiple hazards (earthquakes and sea level rise) to enhance the resilience of businesses to natural disasters and the impacts of climate change. Because one-third of the 1.1 million new jobs over the next three decades are expected to be accommodated within existing building space, the codes will consider both retrofits and new construction. The process of model code development would involve consultation with jurisdictions, industry, and stakeholders to balance the needs of businesses with community priorities.

This strategy would involve:

- Analyzing the needs of different kinds of growing industries, focusing first on those seeking to locate in PDAs. Companies, small business organizations, industry groups, and jurisdictions would be surveyed to gain and confirm information. This would involve outreach in appropriate languages to business communities for whom English is a second language. Following the analysis, ABAG would produce a report illustrating the spatial needs of different kinds of activities, including the way in which these activities can be successfully integrated into different contexts and at different densities (density levels could be linked to the PDA Place Types).

- Identifying successful efforts by cities in the Bay Area, state, and beyond to accommodate these activities in a way that benefits the communities in which the activities are located, including places at a variety of scales and densities. This would involve compiling zoning ordinances and other codes and identifying success factors.

- Developing and distributing model zoning and building codes, as well as incentives and other regulatory mechanisms if appropriate. The codes would be distributed to jurisdictions in a report categorized by economic activity (e.g. temporary retail) and place type (e.g. city center), as well as in a set of electronic files with model text, tables and graphics to incorporate into local standards. This would involve multiple rounds of revision based upon stakeholder and jurisdiction feedback.

- Providing assistance to jurisdictions in interpreting and implementing the model codes.

Strategy Two: PDA Start-Up to Scale-Up Initiative

This strategy would build upon Strategy One to help ensure that a diverse array of start-ups (ranging from software companies to "smart grid" developers to food and clothing makers) locate and expand operations within the network of transit-connected PDAs. This involves updating local zoning and other standards to integrate these activities into PDAs (addressed in strategy one); improving coordination between start- ups, property owners, and jurisdictions about the needs of emerging businesses and their potential contribution to PDAs; and increasing the flow of information about demand for and supply of space—both public and privately owned—in PDAs. The final issue is particularly critical for small businesses that are prepared to begin selling at farmer's markets or move into an office space, but have limited information about the range of available options and the potential benefits of selecting different locations. For jurisdictions with underutilized property inside PDAs, increasing the flow of information can help attract vendors to weekly fairs, or help find temporary tenants for vacant storefronts along main streets, helping create the critical mass necessary for successful retail district.

This strategy would help bridge the existing information gap while also enhancing collaboration between start-ups, jurisdictions, and property owners to help create more vibrant business environments in PDAs. It would draw upon the region's wealth information systems expertise and entrepreneurial spirit. Jurisdictions would opt-in to the initiative by agreeing to provide updated data about their Priority Development Areas and helping coordinate outreach efforts.

The initiative would be two-fold, including an ongoing research and outreach component and an online component. This would involve:

- Performing research into the economic, physical, and infrastructure conditions of the region's PDAs, including:
    - Existing economic landscape of the region's PDAs: Concentrations of different activities, clustering of emerging industries, vacancy levels, characteristics of market area, and levels of projected growth.
    - Amenities: Transit access, local services (e.g. restaurants, grocery stores, cafes, etc), public facilities (e.g. schools and libraries), and parks and open space
    - Plans and regulations: Permitted development; entitlement streamlining, incentives and information about one-stop service centers for permits, licensing and other requirements
    - Opportunities to acquire space: farmer's markets; "pop ups" and other temporary retail spaces, offices, exhibits, galleries, and studios; street fairs; incubators (research and development as well as pooled office space); and vacancies advertised on the private market

- Conducting outreach to build awareness of the initiative, gather information, and develop partnerships. This would target:
    - Property owners, local businesses and community organizations (in multiple languages) to build awareness of program and opportunities within PDAs. This could be driven by local economic development groups. Computers could be provided in government offices, libraries or elsewhere to expand online presence.
    - Jurisdictions to make aware of opportunities to provide additional space on a temporary basis or manage implementation of code changes
    - Start-ups and growing businesses representing emerging technology, food, cultural, and services sectors to identify opportunities and obstacles to locating and succeeding in PDAs.

This could take the form of an annual focus group.

- Creating and operating an online platform. This would involve:
    - Identifying a team to design and operate a permanent website focused on business development in PDAs. This could tentatively be called "Start-Up Scale-Up Bay Area," and could be a public/non-profit/private partnership supported by a combination of jurisdictions, workforce investment boards, research institutes, web design groups, and labor and business groups.
    - Centralizing the information gathered through the research and outreach effort, as well as information from other workforce development and county and local business development websites.
    - Establishing a data sharing agreement with participating jurisdictions, service providers, and other key data sources (including sources for gathering data from building owners). This would allow the data on the website to be frequently updated and remain current.
    - Operating a website that allows users to:
        - Search for space by type (e.g. farmer's market, retail shop, lab), location, price, amenities, market area, walk score, etc;
        - View the In map view, users could see the range of amenities nearby a location being offered (e.g. restaurants), planned improvements (e.g. street trees/better sidewalks), permitted development, and other location-specific data.
        - Link to sites offering financial assistance and other incentives for starting or expanding a business.
        - Add listings free of charge (listings will be included on the site in text and map form, and the locational information regarding amenities and other factors will be associated with the listing)
        - Contribute to and create forums that can develop organically
        - Link to social media tools such as Twitter, Facebook, etc.

Strategy Three: Annual RPC Economic Development Forum

A key objective of Plan Bay Area and the Regional Prosperity Plan is to better integrate economic development into regional planning activities. These efforts have brought together a diverse set of stakeholders to focus on economic issues of regional importance. Regional bodies have an important role in maintaining this momentum by continuing to convene action-oriented forums that include a cross-section of the Bay Area's population and are accessible to the public.

With representation from the region's elected officials and members of the business, environmental, equity, and labor communities, the RPC could host discussions on regional economic development priorities in the context of comprehensive land use planning and development of complete communities. This strategy proposes the creation of an annual forum on a place-based economic development priority that would lead to concrete actions implemented by jurisdictions, regional agencies, and partners.

The strategy would involve:

- Devoting one RPC meeting per year to a workshop on an Economic Development Priority. Based on the Regional Prosperity Plan and the potential priorities proposed in section 4.1 of this paper, ABAG staff will work with the RPC to identify an annual Economic Development Priority topic (e.g. expanding social infrastructure in Centers, or diversifying land use mix in Office Parks). The priority topic would vary from year to year to help address the unique challenges of parts of the region with different levels of density, land use mixes, and levels of transit access.

- Identifying potential actions: the anticipated outcome of the workshop would be a set of recommended regional actions that would be compiled into a report and presented to the ABAG Executive Board for adoption. In advance of the workshop, ABAG staff would produce an in-depth paper on the priority issue and provide a menu of potential actions that jurisdictions and the regional agencies can take to address the issue. During the workshop, RPC members could rank potential actions, introduce others, and help identify partnerships for implementing the actions.

- Producing a report with recommended actions based upon the RPC workshop for adoption by the Executive Board. Following executive board adoption, the report would be distributed more broadly as an agenda for regional action.