TREASURE COAST REGIONAL PLANNING COUNCIL

MEMORANDUM

AGENDA ITEM 6

To: Council Members
From: Staff
Date: April 12, 2019
Subject: SunRail Field Tour: Overview and Lessons Learned

Introduction

The purpose of this item is to provide an overview of a field tour of SunRail stations and associated Transit Oriented Development (TOD) that was undertaken in early 2019. The South Florida Regional Transportation Authority (SFRTA) requested Council’s assistance with logistics and evaluation of observed conditions. Council staff will provide a summary presentation to Council, highlighting key “lessons learned” to advance TOD along the Tri-Rail Corridor and other locations as appropriate in the Southeast Florida region.

Overview

The relationship between land use and transportation systems is one of the most defining characteristics of competitive, successful, and sustainable regions. Those regions include multimodal transportation networks, with a range of mobility choices for the traveling public, where commuters, visitors, residents and others can travel by car, transit, foot, or bike comfortably and conveniently. Thoughtfully planned land use patterns designed in conjunction with transportation networks yield the greatest efficiency and most effective mobility, connectivity, and access.

The land use/transportation relationship is especially evident around successful transit systems. Because every transit trip essentially begins and ends as a pedestrian trip, there is heightened focus on the “last-mile” connections to and from transit stations to boost transit performance. The ideal condition includes transit stations and transit corridors that represent “transit-oriented development,” or TOD, which tends to include a mixed-use pattern of pedestrian-friendly, higher density development with reduced parking. This term was first coined in the late 1980s, becoming popularized in the 1990s after empirical research documented the benefits of TOD for transit ridership and property values. TOD has become a key criterion in the Federal Transit Administration’s evaluation of funding requests due to its ridership benefits, and the Florida Department of Transportation has developed a “TOD Guidebook” to provide local government and agency guidance for TOD implementation. TOD also has a direct benefit for land values, and national studies have documented up to a 42% increase in land values within a half-mile of transit stations compared with types of development located further away.
The SFRTA, which operates the Tri-Rail commuter rail service in Miami-Dade, Broward, and Palm Beach counties, has prioritized TOD as the most important land use consideration for existing and planned stations, and it has become a focus for local governments as well. Recently celebrating its 30th anniversary, Tri-Rail was established in 1989 and provides daily ridership of roughly 15,000, providing service to eighteen stations along its 72-mile corridor. To expand knowledge of TOD in other regions and identify opportunities for collaboration, the SFRTA requested Council’s assistance to arrange a tour of Central Florida’s SunRail system in early 2019. SunRail operates in Orange, Osceola, Volusia, and Seminole counties and Central Florida’s only commuter rail system. SunRail is now in its fifth year of operation, carrying roughly 6,000 daily riders, servicing sixteen stations along its current 49-mile corridor. SunRail has been recognized through research and media for facilitating and expanding successful TOD at many of its stations.

While Tri-Rail and SunRail operate with similar train equipment and station designs, the land use pattern and TOD planning along the two corridors is markedly different. The Tri-Rail system was constructed along the South Florida Rail Corridor (former CSX rail corridor), west of I95 in a land use condition that is mostly low-density suburban industrial and commercial with limited residential. The system was developed before a modern understanding of TOD and its benefits, and consequently, most stations are designed as park-and-ride stations, with surface parking lots and few destinations within walking distance. To advance TOD conditions along the Tri-Rail corridor, the SFRTA adopted a TOD Policy in April 2017 that sets forth policy goals for local governments, including market-responsive flexibility for land use mix, higher density and intensity development patterns, reduced parking, and improved interconnectivity (see Attachment 1).

Although the Tri-Rail corridor is nearly built-out, the land use pattern is auto-dominated, with deficient connections for pedestrians and cyclists and a limited number of transit-oriented uses in the “pedestrian catchment area” of today’s Tri-Rail stations. To improve ridership and land use patterns, the SFRTA has been working extensively with local governments to assess station-area conditions, encourage TOD through transit-supportive land use policies and regulations, and improve station access, especially for pedestrians and cyclists. For Tri-Rail’s Coastal Link expansion onto the FEC Railway, the agency has been conducting outreach with local governments to prioritize TOD as a precursor to station construction.

SunRail’s relationship with TOD began in a different manner and was benefitted by timing, national TOD success stories, and a well-organized group of public and private advocates who determined through regional visioning that synchronized land use/transportation planning was essential for a successful commuter rail system. Accordingly, SunRail’s TOD efforts began well before the final alignment was selected, with a first round of TOD workshops in 2007, seven years before its first day of service. Corridor-wide TOD workshops continued in 2011, with the development of station area plans, followed by TOD developer forums in 2012. The investment in early TOD planning is evident today, and recent studies indicate in its first five years of service (from 2014-2019), the SunRail service has boosted land values nearly $1.2 billion around stations and along the corridor.
Lessons Learned

As requested by SFRTA, a field tour of eleven SunRail stations was arranged by TCRPC staff from January 31-February 1, 2019. The tour included assessment of station area conditions as well as meetings with local government staff, property owners, and the SunRail executive director. The tour confirmed the emerging TOD pattern that is underway at a number of SunRail stations as well as design considerations for future Tri-Rail station enhancements and access. There are a series of “lessons learned” that are being utilized by Council and SFRTA to advance TOD and enhance regional multimodal transportation. These include the following broad ideas:

1. **Stations and TOD equal Economic Development.**
   Local governments view stations as investments to grow and retain business activity, jobs, and economic prosperity. As property values increase, especially with higher densities, local governments benefit with increased revenues and investment to further enhance economic conditions. Local governments also gain access to expanded mobility options, which improves job access and reduces congestion.

2. **It is beneficial to get TOD land use and zoning in place as early as possible (ideally before the station is developed).**
   SunRail led station area TOD planning efforts fully seven years before the system began operations, which created predictability and consensus for TOD-appropriate densities, intensities, and land use patterns. This included retrofitting suburban areas with higher densities and incorporating urban TOD patterns with appropriate building height and scale transitions to complement existing suburban conditions.

3. **Station Context and Connectivity Matter.**
   The most walkable SunRail station areas are those within historic downtowns that have existing street grids and urban block structures, and suburban districts are being developed with an emphasis on bicycle/pedestrian connections, complete streets, and safe, comfortable access.

4. **Station-Area land owned by FDOT has become a station-area “land bank.”**
   In 2021, FDOT will transfer the SunRail system responsibility as well as its assets to local governments (four counties plus the City of Orlando). Local governments are planning station areas with reliance on the pending land transfers, anticipating public/private development that includes current surface parking lots, which will help generate local revenues to pay for the system.

5. **There is a need for local champions to keep stations and the system a priority.**
   Well-organized, collaborative public and private leadership was a foundational component of SunRail’s funding and system development. This is evidenced through legislation, funding appropriation, and local government plans, policies, and regulations. In addition, given the complexity of local land use regulatory processes, leadership is also needed within governmental structures to maintain TOD priority for policy adoption and infrastructure investments.
(6) SunRail’s station transit connections are well-defined, intuitive, and easy to use. The SunRail system is the center of Central Florida’s multimodal transit system, and stations are developed as intermodal hubs for a variety of connecting services (e.g., County bus, NeighborLink local trolley, LYMMO downtown circulator, shuttles). Transit connections are well-defined, clearly communicated, and easy to access and use.

(7) SunRail’s TOD pattern works as an interconnected corridor, wherein different types of uses are linked together by the system. The SunRail station areas maintain local distinction and character, with TOD that responds to local market demand and scale. There is a varied station typology, with some stations developed as suburban or urban mixed-use hubs, traditional downtowns, and employment hubs (e.g., Orlando Health and AdventHealth hospitals). The varied land use conditions are reflected in the system’s ridership pattern.

(8) Naming Rights are Valuable. The Tupperware, Orlando Health, and AdventHealth stations are named for those uses, which promoted private participation and leadership with a vested interest in the SunRail system’s establishment and operations.

(9) Development activity is responding to market demand for station-area residential use. There are several new station-area rental complexes, with densities of 30-50 du/acre, in 4-6-story buildings at several suburban stations, with urban-scale, higher densities in downtown Orlando. The surveyed residential projects appear to be professionally managed with extensive amenities, which are drawing market rate rents.

(10) Local governments have strong ownership over their stations, which is reflected in station upgrades and high standards for maintenance and upkeep. Since the system’s establishment, FDOT has been consistent in its requirement that SunRail will shift to local governments after seven years (in 2021). Local governments have funded substantial station upgrades, with the most elaborate stations in Longwood and Winter Park and other stations distinguished by locally-funded landscaping and artistic embellishments. Local governments are responsible for parking area maintenance, which was evident in clean, well-lit, decoratively landscaped parking lots.

(11) The SunRail system feels like a customer-focused system. The system is easy to navigate, with touch-screen ticketing, and backlit station area maps that clearly illustrate how to connect to nearby destinations. Stations and parking areas are well-maintained, clean and brightly lit, with good visibility to and from surrounding areas. Select stations are staffed by station “ambassadors,” who act as customer-service specialists, with extensive knowledge of station areas as well as varied destinations along the entire corridor.
(12) **There are substantial benefits for Tri-Rail/SunRail collaboration.**

The two systems utilize similar train equipment and station designs, with opportunities for economies of scale for purchasing, contracting, and other activities. There are also advantages from a coordinated legislative and policy approach.

SFRTA and Council staff are already utilizing lessons from the SunRail field tour to improve the understanding and advancement of TOD in the Southeast Florida Region. At the Council meeting, staff will provide specific examples of the “lessons learned” through an overview presentation.

**Council Action – April 19, 2019**

**Recommendation**

For informational purposes only.

**Attachment**
Transit Oriented Development Policy
Advancing Vibrant Communities and a More Prosperous Region

SFRTA is a transit agency that provides a critical service for Southeast Florida’s economy and quality of life. To fulfill our role, SFRTA needs funding to survive and grow, and one of our primary revenue sources is ticket sales. Without Transit Oriented Development (TOD) we cannot operate and make sound investments in passenger rail.

TOD is the most important factor for ridership. TOD is a mixed-use pattern of pedestrian-friendly, higher density development with reduced parking around transit stations - all factors that help generate revenues for local governments and Tri-Rail.

Local governments are the leaders to advance TOD in the region through zoning and development regulations. Although it can be challenging to balance engineering, design, and political considerations, successful TOD must embrace higher density, reduced parking, and a broad mix of uses surrounding the station at its core. Without these characteristics, TOD cannot be supported along the Tri-Rail service corridors.

TOD has many benefits to residents, businesses and local governments, but the SFRTA needs it for one reason: ridership. As a partner with local governments and the development community, SFRTA advocates zoning and land development regulations that maximize these principles.

Continuous Infill Pattern
Extending at least a half-mile from transit stations that is safe, pedestrian-friendly and reduces auto-dependency.

Increased Mix of Uses
Supports vibrant communities near transit stations. The greatest market flexibility occurs when few uses are prohibited rather than traditional segregation of uses.

Limited or No Required Parking
Stimulates business investment, generates local revenue, and encourages people to use transit. Parking requirements may be eliminated for the best TOD market response.

Higher Density
Benefits ridership and local economies, especially when it averages 75+ sf/acre, yielding up to 40,000 units in the half-mile surrounding transit stations, and includes housing for at-wills of life.

Adopted by the SFRTA Board, April 2017