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Forming Partnerships to Promote Transit-Oriented Communities and Joint Development

Abstract: This document guides transit agencies in partnering with businesses and community entities to promote transit-oriented communities, joint development, and enhanced urban design and transit service.

Keywords: business, joint development (JD), partnerships, transit-oriented community (TOC), transit-oriented development (TOD)

Summary: This document outlines a variety of approaches that transit agencies could use for development of partnerships with other public entities and the private sector to promote the implementation of transit-oriented communities. Partners can include local governments, state and regional agencies, private developers, and special interest groups. Partnerships can assist transit agencies to advance service improvements and capital projects more effectively, helping the transit agency to overcome common jurisdictional barriers.

Examples in this document identify uses of partnerships to:

- influence site design and infrastructure at the project level;
- influence infrastructure and land use in private developments in the vicinity of existing and planned transit service;
- secure operating funding from other public and private sources;
- improve transit operations in mature and developing areas;
- encourage access improvements for transit stops, hubs and fixed-guideway stations;
- encourage land use planning and transit-oriented development at existing or new transit stops, hubs and stations;
- assemble land; and
- coordinate public sector improvements along fixed-guideway routes.

Foreword

The American Public Transportation Association is a standards development organization in North America. The process of developing standards is managed by the APTA Standards Program's Standards Development Oversight Council (SDOC). These activities are carried out through several standards policy and planning committees that have been established to address specific transportation modes, safety and security requirements, interoperability, and other topics.

APTA used a consensus-based process to develop this document and its continued maintenance, which is detailed in the manual for the APTA Standards Program. This document was drafted in accordance with the approval criteria and editorial policy as described. Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

This document was prepared by the Sustainability and Urban Design Working Group, as directed by the Sustainability Steering Committee.

This document represents a common viewpoint of those parties concerned with its provisions, namely transit operating/planning agencies, manufacturers, consultants, engineers and general interest groups. The application of any recommended practices or guidelines contained herein is voluntary. APTA standards are mandatory to the extent incorporated by an applicable statute or regulation. In some cases, federal and/or state regulations govern portions of a transit agency's operations. In cases where there is a conflict or contradiction between an applicable law or regulation and this document, consult with a legal adviser to determine which document takes precedence.

This updated document supersedes the original APTA SUDS-UD-RP-002-09, also incorporating material from APTA SUDS-UD-RP-006-12, "Transit Agency Partnerships to Improve Urban Design and Enhance Service Effectiveness," which has been withdrawn. This combined document reflects what is most relevant to today's policy and planning context. All case studies have been reviewed and updated, and new examples have been added. In addition, the discussion on the role of transit in transit-oriented communities has been expanded, with a focus on the complex coordination required across multiple stakeholders to achieve successful outcomes.

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Participants

The American Public Transportation Association greatly appreciates the contributions of the **Urban Design Working Group**, which provided the primary effort in the drafting of this document. At the time this standard was completed, the working group included the following members:

Ron Kilcoyne, *Transportation Management & Design*, Chair

Tunyekia Adamson, *CARTA*
Zelalem Akalewold, *BART*
Bo Baney, *San Mateo County Transit District*
Tiffany Batac, *KPMG*
Manal Bishr, *BART*
Adam Borsch, *HDR*
Chung-Soo Doo, *Caltrain*
Tim Chan, *BART*
Andrina Dominguez, *WSP*
Jennifer Easton, *BART*
Maya Emsden, *LA Metro*
Mustafa Fardin, *Larson Transportation Institute*
Tian Feng, *BART*
Jada Golland, *Sally Swanson Architects*
Michael Gougherty, *WETA*
Yolande Harrison, *Dallas Area Rapid Transit*
Michael Horsting, *Chicago RTA*
Charlie Jackson, *MARTA*
Emily Judson, *WMATA*
Jack Kanarek, *Dewberry*
Maria Antony Katticaran, *HDR*
David Kuperman, *TransLink*
Daniel Lee, *WMATA*
Lindy Lowe, *Eastern Research Group*
Sara Margolis, *Dewberry*
Patrick McDonough, *HDR*
Kelly Placilla, *HDR*
Rebecca Roush, *Sound Transit*
Nick Saponara, *LA Metro*
Gavin Schaefer, *Sound Transit*
Steven Schukraft, *HDR*
Amy Shatzkin, *Sound Transit*
Christof Spieler, *Metro Transit*
Sally Swanson, *Sally Swanson Architects*
Emma West, *WMATA*
Norman Wong, *Sodali & Co*

Project team

Christina Jung, *American Public Transportation Association*

Introduction

This introduction is not part of APTA SUDS-UD-RP-002-09, "Forming Partnerships to Promote Transit-Oriented Communities and Joint Development."

APTA recommends the use of this document by:

- individuals or organizations that operate transit systems;
- individuals or organizations that contract with others for the operation of transit systems; and
- individuals or organizations that influence how transit systems are operated (including but not limited to consultants, designers and contractors).

Scope and purpose

This recommended practice includes guidelines to assist transit agencies in defining policies and practices for developing and maintaining partnerships to advance, support and implement transit-oriented communities. It will assist agencies in identifying opportunities to benefit from partnerships, establishing working relationships with potential partners, and maintaining and leveraging those partnerships for application in subsequent projects. This document provides a menu of approaches, brief case studies, and lessons learned for a wide range of potential teaming arrangements.

Forming Partnerships to Promote Transit-Oriented Communities and Joint Development

1. Partnerships for land use planning and development

In transit-oriented communities, land use and transit services thrive together. Synergies are created as land use and transit service are coordinated and planned to optimize each other. This section provides specific guidance for promoting partnerships for land use planning and the implementation of development that fosters transit-oriented communities.

1.1 Definition of transit-oriented communities

Transit-oriented communities have the following characteristics:

- Transit facilities contribute to making a "place," are attractive and functional, and serve as community destinations.
- The community has access to transit facilities that balance the needs of all modes and users to support and encourage/facilitate pedestrian, bicycle and transit trips by providing safe, barrier-free and direct routes to transit.
- Neighborhoods around transit facilities are organized so they support and encourage a range of land uses at appropriate densities, services and amenities through existing and new development.
- Transit corridors take advantage of the variety of nearby neighborhoods and destinations to encourage a diversity of places and access modes.
- The transit network connects users to key regional destinations and supports the economic health of the region and its communities.

1.2 Features of transit-oriented communities

The following features support the creation and viability of transit-oriented communities that are accessible and inclusive, and meet the Urban Design Standards Program goals:

- **Accessibility:** All individuals, regardless of age or physical ability, should be able to intuitively and safely navigate transit services without encountering any significant, unexpected impediments or barriers. Universal design informs wayfinding solutions for everyone. Transit information for all individuals, including those with sensory and/or mobility impairments, should also be readily available in an array of specialized assistive formats, whether riders are using transit every day or only occasionally.
- **Walkability:** All transit riders are pedestrians before and after their transit trips, whether they are walking unaided or using mobility devices such as sight/white canes, support canes, walkers, wheelchairs or other assistive sensory and/or mobility devices. They should be able to safely, intuitively and comfortably access transit facilities and the surrounding communities. Pedestrian access to transit facilities is therefore prioritized above all other modes of travel.
- **Mix of uses:** A range of available and accessible land uses, services and amenities are necessary to support transit and community vitality through various types of accommodation.

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- **Equitability:** Transit-served areas need to function in an equitable manner, ensuring that housing options are available for a variety of income brackets, ages and levels of mobility; that the area and transit services are connecting people to nearby jobs and needed community services and resources; and that policies and procedures are in place to prevent displacement of existing residents should the station area grow.
- **Connectivity:** Transit must be part of a wider network of travel options that allow riders to meet both daily and occasional needs, locally and within the region. Priority networks including bus-only streets, a combination of radial and grid patterns, restrictions on through traffic movements, or enhanced active transportation facilities and non-street connections can improve connectivity for non-automobile modes and improve the transit-oriented and accessible characteristics of station areas.
- **Density:** Riders depend on a concentration of activity proximate to transit facilities. Development styles dense enough to support existing and future transit services in the area are needed to ensure a sufficient ridership base. The style of density varies and should respond to resident needs and desires.
- **Adaptability:** Transit facilities should include flexibility to respond to changing passenger needs due to demographics, aging, mobility and facility conditions over time while still investing in long-lasting materials and infrastructure.
- **Comfort, attractiveness and inclusivity:** Transit facilities and the surrounding communities should be pleasant, inviting and easy-to-use places that provide comfort and encourage the use of available services by all patrons at any age with or without a disability. Artwork enhancements and architectural excellence are some of the most effective ways to support these efforts, in addition to meeting the basic needs of riders with ample amenities, including mobility aids; assistive technologies; and clean, well-maintained facilities.
- **Safety and security:** Transit facilities and the surrounding communities should provide for users' physical safety and security by addressing potential points of conflict and safety for riders using all access modes. Activating stops and stations with programming and community gathering spaces that fit intuitively and contextually into the surrounding area will provide added activity and safety to the area. Transit facilities and surrounding communities should use crime prevention through environmental design (CPTED) techniques to address the security of all users.
- **Legibility:** Transit facilities and communities should be intuitive and understandable and should help riders orient themselves through well-designed signage and elements of wayfinding. Wayfinding, signage, seating, lighting, tactile elements, audio and acoustics should be addressed systematically to ensure no sensory or visual clutter.
- **Economy, Resilience and Sustainability**: The design, construction and maintenance of transit facilities and TOD should consider the use of sustainable materials, consider climate change adaptation and resilience strategies, and account for life cycle or long-term costs. The APTA Recommended Practice, **Transit Climate Resilience Guidelines - A Compendium of Strategies**, provides applicable guidance.
- **Partnerships:** To ensure accessibility, inclusivity and overall success, transit agencies should engage with multiple stakeholders, including disability advisory committees, and identify public, private and community partnerships, including joint development ventures, for the planning, design, construction and ongoing maintenance of transit facilities and surrounding communities.

1.3 Transit agency roles in advancing transit-oriented communities

The development of TOCs is dependent on land use plans and zoning of areas served by transit. Transit agencies can take a role in planning for transit-oriented land use by developing partnerships with local government, the private sector and citizens. There are several ways transit agencies can advance transit-oriented communities in their service areas, depending on the governance structure of the agency and the authorizations it is given.

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Some agencies are divisions or departments of a local government entity, such as a municipality or county. In this case, coordination and working closely with other departments, such as Planning, Community and Economic Development, and Zoning, are important to advancing transit-oriented communities. Other agencies are independent units of government and need to strategically form key partnerships with units of government that have land use authority. Depending on the governance structure, transit agencies must assess their statutory authority and willingness to undertake a role in working with governmental land use decision-makers, the public and other stakeholders to invite partnerships and coordination in urban design issues.

There are a variety of roles agencies can play to advance TOCs, including the following:

- **Planning:** Planning for TOC development is the key first step. Agencies should start with higher level planning to develop a community vision, as well as typologies at a variety of transit-served areas over a large geography. More detailed planning should take place at the stop, station or corridor level that first incorporates data collection to understand any land use and utility capacity constraints. These detailed plans should include robust community engagement, as well as a housing and commercial market analysis. The results of the engagement and analysis will determine community needs and the market demand for an appropriate mix and location of land uses and development densities, along with appropriate urban design and public realm requirements for new development. Planning will also identify any policy changes or financing strategies necessary to achieve new development that's centered on transit. The approach may vary depending on the size and nature of the service area. If possible, transit agencies should be at the table during the planning process with land use decision-makers, whether at the metropolitan planning organization, regional council or other regional planning effort, as well as at the local municipal level to define plans and partnerships that will advance TOCs.
- **Communication and engagement:** Promoting the benefits of TOCs is an important role for any transit agency type. This should include convening conversations about the benefits of TOCs with the general public, riders and future riders, as well as appointed and elected officials. Communication is also crucial with entities offering funding sources that can be used to attract and incentivize new development near transit.
- **Development review:** Reviewing development proposals is an important step in ensuring that new development meets the needs of the community and is built so the use of transit and transit operations are maximized. For transit agencies that are a unit of local government, development review can be coordinated internally with the department receiving and leading the review, such as the Community Development or Planning department. Transit agencies with other governance structures can also participate in development review upon request, asking local municipalities to form a partnership in development review, as well as developing their own design guidelines and standards that can be offered to municipalities for their use.
- **Additional partnerships and relationship-building:** Other partnerships beyond those with municipalities can be formed to advance TOCs. Forming partnerships with roadway agencies offers the transit agency an opportunity to influence roadway design that complements new development near transit stations and especially along transit-served corridors. Relationship-building with nonprofits, the development community and community-based organizations who can play a role in TOC planning, advocacy and construction can also forge important partnerships to advance mutual interests in TOC development.

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- **Project sponsor:** Transit agencies often own land at or adjacent to their stations, stops and facilities that can be developed to include TOC on agency-owned land. Acting as a primary driver for a project on its land, a transit agency can be a primary developer itself or a joint developer with other public and/or private partners. In this role, the agency participates in the local development process in the community where the site to be developed is located. As a TOC project sponsor, the agency may also take on one or more of the other roles described above. This approach has been described as joint development (JD).

2. Background for establishing partnerships

Transit agencies are largely dependent upon the cooperation of the jurisdictions in which they provide service. This applies both to the operation of and access to transit service, and to the provision of the supporting transit capital investments. Virtually all aspects of transit service depend upon successful partnership with one or more outside parties that control the environment in which transit operates, including the type and form of the community's land uses.

There are many partnership arrangements that can assist transit agencies in building relationships and trust. They include multiagency review processes; establishment of tax improvement financing and/or benefit districts; establishment of regional oversight entities, inter-local agreements, advisory committees, legislation, initiatives and referenda; staff sharing; and workshops, among other institutional arrangements.

Representative areas in which transit depends upon these partnerships include the following:

- **Land use:** Coordination of land use and transit planning to provide both the type(s) and intensity of development along major travel corridors that facilitate operation of high-quality transit service for residents and businesses.
- **Access:** Integration of transit with adjacent land uses, provision of public infrastructure to accommodate transit access and egress by all modes including active transportation (walking and all mobility devices), shared transportation (on-demand and scheduled transportation) as well as autos in lower density settings, and adoption of urban design standards that prevent or remove barriers between transit service and residents and businesses.
- **Roadway configuration:** Identify the streets that will be used by transit to allow for safe operation of service; locate transit stops to optimize access to the surrounding area; minimize transit travel time; provide a safe and inviting place for passengers to wait; and in congested areas include cost-effective treatments that prioritize transit vehicle movement.

2.1 Transit agency structures

The position of the transit agency within local/regional/state government varies substantially depending upon local politics and state legislation for transit. While most of the approaches to partnership development are applicable regardless of the transit agency structure, the position of an agency is still a worthwhile consideration. Examples of organizational structures are identified below:

- **Part of city or county government:** The Charlotte Area Transit System (CATS) is a department of the City of Charlotte government. The director of public transit reports to the Charlotte city manager. This position within city government provides the opportunity for the transit operator to work closely with other city departments, such as Traffic Engineering and Planning, on a regular basis.
- **Multijurisdictional/regional agency:** Metro Transit is a division of the Metropolitan Council serving seven counties in the Minneapolis–St. Paul metro area. In addition to providing transit service, the council provides regional planning services for wastewater treatment, community planning, population forecasting, affordable housing and parks. Metro has the opportunity to call upon "sister"

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regional agencies' implementation authorities to help leverage implementation of major transit projects that cross local jurisdictional borders. TransLink in Vancouver, British Columbia, is a regional transportation authority responsible for funding the maintenance of major roads and bridges, and maintaining their capacity.

- **Freestanding agency:** The Metropolitan Transit Authority of Harris County (METRO) is an independent entity providing transit service to the Houston metropolitan area. METRO is governed by a board of directors appointed by the City of Houston, Harris County and the remaining cities within the county. The autonomy of independent agencies such as METRO provides greater flexibility in internal decision-making but can increase the reliance upon others for service or project implementation.

As stated above, approaches to partnership development are applicable regardless of transit agency structure. For example, a transit agency part of a city or county government working with other departments may not be any different than a freestanding agency working with the same departments of the municipalities served if the staff are not transit-focused.

2.2 Types of partners

Depending upon the nature of the initiative or project, the transit operator may want to draw from a broad range of partners to enhance the opportunity for success. Potential partnerships could include any or all of the following:

- **Individual residents and local businesses:** They help establish the market and community demand for the kinds of homes, streets, neighborhoods, stores, offices and transportation amenities where they live and work.
- **Developers and other private sector entities:** They can help finance, plan, design and construct residential, commercial retail, office and industrial developments, and other physical facilities needed to serve those developments, all in response to market and community demands.
- **Local governments:** They establish zoning and development standards; approve and permit the final development plans that private entities undertake; construct and maintain infrastructure including streets, utilities and greenery; and manage station area planning and open space park and recreation areas required to support development. They can also generate revenue measures that support infrastructure and other amenities supportive of transit. Local governments regularly have requirements for public art enhancements as part of public and private development. Note that local governments may also have TOC policies that designate certain areas for growth and transit-oriented development. Their local policies or codes can support or require walkable blocks, mixed land uses, higher densities or improved active transportation connections, creating the conditions needed for TOC.
- **Regional planning agencies and metropolitan planning organizations (MPOs):** They can encourage, facilitate and allow local governments, citizen groups and the private sector to develop a shared vision of:
    - desirable urban form;
    - general plans for land use and development in the region;
    - an appropriate balance of highway and transit development;
    - general standards of urban design for the region; and
    - funding opportunities (revenue measures, grant programs, etc.).

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- **State and/or city departments of transportation, regulatory agencies, resource agencies, housing, economic development, and other community agencies or boards:** They implement highways, public buildings and other physical facilities, and/or distribute funds and give approvals for the implementation of those physical buildings and facilities. Higher levels of government may also have TOC programs, tying future development to new transit facilities, either through direct partnerships with developers or through specifications and a market offering process.
- **Other transit and human services transportation operators:** They can offer their perspective and insight regarding various urban design/land use and service issues and needs. Coordination with them can be beneficial to develop a shared approach.
- **Other mobility providers:** Transportation network companies and other companies involved in micromobility modes, such as bike and scooter sharing, can improve connectivity to transit.
- **Community-based organizations (CBOs):** CBOs can be effective advocates for transit-supportive development and policies.
- **Internal transit agency departments:** They can be helpful in enabling the agency to commit staffing and financial resources to different projects. In the case of projects that occur within stations, on the transit system or beyond, getting internal buy-in before engaging external partners is often critical.

Typically transit agency staff work with staff at the partner organizations referenced above. However, the elected officials (city council members, county boards, state legislators) can be effective champions for TOD and TOC and should be cultivated as well. This can be accomplished by transit board members communicating with elected officials with support of staff, or staff can be delegated to work directly with elected officials.

Transit providers that establish good working partnerships with these groups can influence urban design and land use in a manner that supports effective transit service that is responsive to community needs.

2.3 Transit agency techniques for developing partnerships

Specific partnering methods and approaches vary widely among agencies. However, several general principles are applicable in creating successful partnerships.

2.3.1 Leadership

Transit providers should be willing to take leadership and reach out to the public and other agencies to invite partnerships and coordination on land use and urban design issues. Leadership in forming partnerships may also be available from individuals in the private sector, public interest groups, elected officials or other public agencies. But the transit agency should be ready and willing to enter joint discussion and shared actions and to provide support and assistance to those parties, sharing leadership roles with them.

Transit agencies can also provide leadership by providing seed money for projects that are supportive of both transit and the community at large, such as access improvements to transit that also improve overall walkability and pedestrian safety. Someone within the transit agency must take responsibility for this process of reaching out to others. This can best happen when the CEO/general manager specifically assigns that role to key staff members and does so with the full support of the policy board.

2.3.2 Public involvement and a shared vision

The process of developing a shared vision of the desirable future for a community is one that must involve the public. There are many strategies that have been used successfully in various cities and regions to achieve this shared vision among residents, but without public understanding and buy-in, it will be hard to achieve change.

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Transit agencies must provide for this kind of continuing public involvement, working in concert with other agencies. There must also be emphasis on listening to members of the public, and effort put forth to let community members and the public know they have been heard through these engagement processes.

Strategies must be equitable, with extra effort to reach out to communities that can benefit or be impacted but may be underrepresented in engagement activities. It takes time to build trusting relationships, and transparency of information and processes is a critical factor in successfully doing so. Staff expertise in techniques of public involvement and communications is critical.

2.3.3 Communication and trust through shared work

Communication means not only talking to other agencies and parties but listening to them as well. Transit agencies must find mechanisms for continuing dialogue—for working together over an extended period with both elected officials and with the staff of local governments, MPOs, DOTs and other community agencies and groups. It takes time to build trusting relationships, and transparency of information and processes is a critical factor in successfully doing so. Just holding a single meeting and then going away and doing business independently of one another does not result in real partnership. Successful transit agencies have created or supported those mechanisms for continuing dialogue by entering shared work programs.

The most successful efforts have often evolved into an ongoing, tiered set of discussions, including community design charrettes at the beginning of a project, giving the community an ongoing voice and say in transit agency project activities throughout the length of a project. It is essential to leverage multiple channels of communication to reach all individuals and organizations.

2.3.4 Written agreements

Informal shared work programs may be successful. Sometimes, however, a formal work program and written agreements are required. Written agreements can spell out the aims and purposes of the parties, the obligations and expectations each party has for the others, the mechanisms for communication, and the general schedule for continuing meetings.

2.3.5 Committing staff resources

Partnerships with other agencies cannot happen without a commitment of staff time from both the transit agency and its partner agencies. This obviously means the use of staff resources—and money—to achieve the purposes desired.

The more thought given to which staff members should be involved in these joint efforts, and how to ensure that agreements reached are communicated to the rest of the agency, the more successful the long-term outcome will be. The commitment of staff resources is not enough unless people with the right technical skills and personal communication characteristics are used. Many agencies have found that the use of staff members with private sector development experience is especially critical for partnerships with developers involved in urban development projects.

2.4 Outreach for developing effective partnerships

There are a wide range of approaches to establishing partnerships with private and public sector entities. In using these approaches, it is important to reach out to partners “where they are” instead of expecting them to automatically see things the transit agency’s way. Approaches include the following:

- Strengthen prior working relationships.
- Reach out to potential new partners.
- Use professional organization relationships.

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- Use community-based organizations and other groups.
- Use transit planning activities as an outreach opportunity.
- Engage with local planning processes.
- Use third-party requirements that can leverage transit involvement.
- Hold or participate in special events.
- Use tools, technologies and approaches to engage different stakeholders.

2.4.1 Strengthening prior working relationships

Building on prior working relationships can facilitate establishing partnerships quickly. Prior working relationships come in many shapes and sizes. The process of establishing new bus stops typically requires working with city service or traffic engineering staff. Fixed-guideway projects such as bus rapid transit or light rail generally result in contact with many city agency departments, state and federal agencies, and possibly private developers. Transit agencies should also leverage long-standing relationships with community-based organizations in the neighborhoods served by transit. Whenever a relationship has been developed for a particular effort, look for opportunities to "mine" that contact for other connections or applications.

2.4.2 Reaching out to potential new partners

Starting from scratch is the most challenging approach to establishing a partnership; however, engaging new partners can be a rewarding experience. Just as in the sales business, cold calls begin without common ground or personal relationships already established. Fortunately, this is an uncommon situation in the transit industry unless the agency is new or has experienced extensive staff turnover. The nature of the transit business generally requires significant interaction with other entities daily.

There are several approaches that can help make a cold call effective. First, the agency must do its homework about the potential partner and the agency/business they represent before establishing contact. Based upon this information, identify realistic benefits the individual or business can realize as a result of the partnership. Also identify any shared working relationships with other individuals or agencies who might offer a positive reference if contacted. Use transit planning tools such as those outlined in Section 3.3 as a base to solicit participation by new partners.

Finally, don't waste the person's time. The agency should have clear goals and priorities for TOC. Approach the potential teammate with a plan that clearly identifies the goals for the partnership and the likely benefits. Listen to their ideas to understand their point of view and respond constructively. Expedient follow-up can further reinforce a good start. Charge ahead and invite the person to lunch to discuss the next steps!

2.4.3 Using professional organization relationships

Transit agency personnel have numerous opportunities to develop useful working relationships through professional organizations and volunteer participation in related planning activities and commissions. Membership in local chapters of national organizations such as the American Planning Association, Institute for Transportation Engineers and Women's Transportation Seminar provide diverse contacts as well as professional growth.

The Urban Land Institute recognizes the connection between land use and transportation, and sometimes funds visioning exercises that can be supportive of transit. Private sector relationships with ULI members can help broaden support for transit initiatives. Private sector relationships also can be developed through membership on a special improvement district board in which an agency is located, or through which its service operates.

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Volunteer roles can also build a broad network that can be useful for future partnerships. Look for appointments to city commissions or special working groups related to planning or transportation. Represent the agency on MPO committees. Offer to become a "transit liaison" for neighborhood or area planning studies conducted by the city. Make a presentation on transit service planning or transit-oriented land use to the local chapter of the Building Industry Association.

The key to building upon any of these kinds of relationships is to make sure they are not contrived exclusively for the agency's benefit. Nurture the relationship through opportunities for both parties, and it will offer rewards to both for some time.

2.4.4 Using community-based organizations and other groups

CBOs, local housing associations, YIMBY (yes in my backyard) and other advocacy groups can be effective partners for developing TODs and TOCs. Depending on the community and the organization, these groups can stand in the way of progress or be effective champions for the TOC goals of a transit agency. Transparent dialogue that involves clear articulation of the agency's goals and the benefits of achieving those goals and listening to the concerns and issues of the organization (and addressing them) can lead to an effective partnership that will further an agency's TOC goals when working with local governments and other partners.

2.4.5 Using transit planning activities as an outreach opportunity

Development of short- and long-range transit plans offers a natural opportunity to develop working relationships that can provide a basis for later partnerships. In fact, these plans are most useful to an agency when they incorporate broad input from city staff, neighborhood organizations and commissions, municipal planning commissions, elected officials, and private developers. In addition to providing valuable community input and broadening support for the plan, involvement of these various parties creates trust and builds credibility for future endeavors. This also creates an opportunity to demonstrate the connection between transit service and appropriate land uses.

2.4.6 Engaging with local planning processes

All urbanized areas with a population of more than 50,000 residents are required to allocate federal transportation funds through an MPO. The planning requirements imposed by this process allow for a significant amount of local discretion regarding the nature of transit involvement. However, there can be great opportunity for transit participants to influence local transportation investments and land use development decisions as a member of the MPO. Specific examples are outlined in the Federal Transit Administration publications "Transit at the Table" and "Transit at the Table II."

2.4.7 Using third-party requirements that can leverage transit involvement

Most of the partnering foundations outlined above are based upon voluntary conditions founded upon trust and recognized mutual benefits. In some instances, third-party requirements can force a reluctant partner to participate in a transit partnership.

Some states mandate local jurisdiction or developer "responsiveness" to transit needs in order to address environmental impacts associated with land use change. Similarly, some local jurisdictions codify requirements for transit-sensitive design or offer benefits for doing so—such as increasing intensity of use or decreasing parking requirements. The nature of these mandates can vary significantly among locales.

Some regions and states now acknowledge the connection between housing and transit access and are developing policies and programs to reward developers or incentivize development of higher density housing adjacent to transit. In addition to creating opportunities for development with transit proximity, there also could be opportunities to jointly fund transit infrastructure.

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2.4.8 Holding or participating in special events

Transit agencies can take the lead or partner with other organizations by holding special events that can be used to educate stakeholders and/or provide networking opportunities. These events can take many forms, including guest speakers, panel discussions, video or media presentations, networking receptions, and static displays. Transit agencies do not necessarily need to sponsor or co-sponsor events and can participate in existing events within the community or region. Educational and outreach efforts at local community events, for example, are effective in raising awareness among members of the general public and creating a foundation for future collaborative efforts. These events include farmers markets, street fairs, and so on. This approach is an excellent way to kick off new initiatives or partnerships at the local level.

When the COVID-19 pandemic occurred, in-person events temporarily ceased, with meetings being held virtually instead. While in-person activities have resumed, virtual or hybrid events continue and have shown to have value, particularly in providing opportunities for individuals who can't attend an event in person to participate. This allows for expanded reach to provide opportunities to inform and receive input from many community members.

2.5 Methods for creating partnerships

There is no shortcut to creating partnerships. However, there are several guidelines that can enhance opportunities for success in both the short and long term.

2.5.1 Make an investment

Effective partnerships do not happen spontaneously. Spend the time to learn what partnerships have been useful in other cities and determine if and how they might apply to the agency's circumstances. Research potential local partners to better understand their goals, constraints and working environments.

2.5.2 Cast a broad net

Build relationships beyond standard professional contacts. Don't worry about whether a relationship might bear fruit in the short term. There may be an opportunity for a project that has not yet been contemplated. In addition, the agency may have the opportunity to assist its partner in the short term.

2.5.3 Not a one-time effort

Just as with establishing an initial partnership, ongoing engagement requires consistent investment. Key contacts within partner organizations will inevitably shift, so the agency must remain attentive and ready to reintroduce itself to new stakeholders. Relationships need to be refreshed as circumstances evolve. Often, a partnership can open the door to additional collaborations. With time, the focus will shift from "What's in it for me?" to mutual benefit. Sustain these connections thoughtfully and intentionally.

2.5.4 Adhere to Title VI requirements

Title VI of the Civil Rights Act of 1964 seeks to ensure that no person in the United States shall, on the grounds of race, color or national origin, be excluded from participation in, denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance. Title VI requirements should play a major role in the ways in which an agency conducts its daily business, including outreach and partnership efforts. This provides an opportunity to be a tie-in with equitable engagement and related partnerships. Among the activities that transit agencies can undertake to comply with Title VI are the development of a Public Participation Plan and a Limited English Proficiency Plan to reach communities where English is not the first language.

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2.5.5 Nontraditional TOC for bus transit systems and small agencies

Much of the literature on TOD or TOC is based on large cities, large transit agencies and rail-based transit systems. It is important to recognize that many of the same principles apply to smaller agencies with smaller capital budgets, as well as to bus-based transit systems, particularly since bus rapid transit is becoming a very popular alternative to various forms of rail rapid transit.

In cases where large-scale TOC is not feasible due to more limited population growth or transit infrastructure, there are still opportunities to secure improvements to transit and active transportation access, and to support development through policies, codes and specifications that ensure high-quality public transit access and thoughtful design.

Bus terminal facilities can integrate retail, office and other uses. New development can be encouraged or required to provide enhanced stops or space for transit priority measures on the approach to a station (enhanced shelters, bus bulbs/bump-outs, queue-jump or queue-bypass lanes, transit signal priority, etc.).

3. Defining agency policies and processes for pursuing TOC and JD

Transit agencies need to have clear policies about the role of the agency and establish goals for transit-oriented communities and joint development programs. They need to ensure that they have the authority to implement the policies established.

3.1 Internal coordination and education

The implementation of TOC around a transit system and the use of JD by transit systems involve policies and processes that differ in many respects from typical transit agency roles and responsibilities. Before TOC or JD is pursued, it is critical that transit agencies internally vet the legal framework that governs their agency, any financial obligations that may impact TOC/JD initiatives, the potential risks, and the opportunities and constraints associated with these projects.

Traditionally, transit agencies' focus lies in operations, maintenance, engineering and construction activities. As a result, they may lack a thorough knowledge of real estate development principles and a realistic understanding of value capture, or simply lack the internal policies and procedures needed to facilitate TOC/JD programs or projects. Transit agencies may also lack thorough knowledge of economic and community development planning, implementation and funding strategies. Internal units within an agency may have different views or perspectives that need to be reconciled.

Additionally, early internal coordination and education can help agency stakeholders not directly involved in TOD/JD projects gain a better understanding of the development process, help establish buy-in, and help the agency develop its overall program goals and objectives. This coordination may include the development of an evaluation framework to guide decisions and ensure that various concerns and criteria are integrated into an objective decision-making process.

Early internal coordination efforts might focus on establishing a multidisciplinary team charged with pursuing TOC/JD opportunities. Team members might include personnel from the executive management team, as well as from the real estate, legal, planning, design, engineering, finance and operations disciplines. Early education efforts might focus on educating the agency's management team and governing board about the principles of TOC/JD, its goals and its benefits. This should include an understanding of the long-range opportunities for orienting regional development around transit services and stations at the scale that supports transit services, as well as community and economic development goals and strategies.

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This ensures that over time transit retains its role as a permanent and essential element of the regional transportation system and supports broader community development goals, therefore engendering support at various levels. This leads to maintaining and increasing ridership and ridership-related revenue. In addition, it provides the opportunity—particularly for joint development projects—for agencies to capture the value of agency-owned real estate. The education effort should give agency stakeholders a basic understanding of the real estate development process.

The goal of internal coordination and education is to develop goals and objectives, establish the legal basis, understand any financial obligations, create buy-in, establish the appropriate organizational structure, and develop a set of internal policies and procedures that support a creative and flexible program. As part of this process, agencies should develop a data-driven framework for evaluating costs, benefits/trade-offs and opportunities (e.g., parking vs. TOC) to inform the process and provide the agency with a better understanding of long-term impacts.

The processes for advancing TOC and JD are closely related and, in many respects, require similar efforts. However, JD is typically more complex in that it engages the agency in contractual relationships with the private sector that involve business, financial, operational and public relations factors. This requires that the agency define its policies and approach for entering into such relationships.

3.2 Community stakeholder engagement

Early outreach efforts can help transit agencies integrate their projects with community plans and initiatives, help establish communication with stakeholders, and help agencies understand and address any opposition to TOC/JD. Transit agencies need to understand the economic and community development issues and the funding sources that support these issues. Community engagement is also critical to understanding community development goals such as community facilities; public spaces (considering placemaking concepts); art spaces; employment opportunities; community services; housing (across income levels); and retail opportunities for local businesses. Any or all of these, and potentially other goals that can impact plans or projects, may warrant consideration.

Considering that there are numerous ways agencies can pursue community engagement, it is important to define a strategy appropriate for each community and project. The transit agency should identify its role in the engagement and planning process. Options to consider include leadership, shared leadership, facilitator, or stakeholder.

Community engagement planning should consider who to involve, how to do so and timing. In the development of the engagement plan, consideration should be given to involving government (including elected officials) as well as community leaders; the public; and potentially the wider public that may in the future be residents, employers or workers in the TOC. Involvement of artists in TOC planning is a potential asset to consider. The engagement plan should reflect and respond to the context of the stakeholders and public as well, providing an understanding of the decision-making process. Including an education and visioning process may also be appropriate. In addition, the timing and scheduling of engagement should be part of the plan.

Agencies receiving federal funds are required to have a Public Participation Plan that provides a framework for how they will ensure meaningful public participation of Title VI populations in the planning and programming stages of agency projects. It may be appropriate to involve TOC and JD initiatives in the agency's Public Participation Plan. FTA guidance and regulations pertaining to JD projects should also be considered in community engagement efforts (see Section 4.2.3).

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3.3 Planning for TOCs and JD

According to the TCRP document "Transit-Oriented Development in the United States: Experiences, Challenges and Prospects":

> "TOD *(referred to as TOC in this document)* implementation ideally starts with a vision, cultivated from broad-based public input, and proceeds to strategic station-area planning backed by appropriate zoning as well as policy incentives and regulations." (page 81)

The guidelines presented in this section are intended to provide techniques for working with municipal governments to develop a vision for TOC and joint development projects.

To advance the implementation of TOC, community leaders and the transit agency should define a process that is appropriate for the specific stakeholders involved in land use planning around transit stations. In defining the process, it is important at the outset to identify stakeholders, including community institutions, that should be involved in the TOC planning process. Furthermore, it is beneficial to identify ways to educate and involve a larger cross-section of community participants to obtain a wider range of input than would be generated by local area stakeholders, including youth, racial/ethnic minorities and non-English speakers. Transit agencies pursuing TOC should work to understand economic/community development financing tools available through the local jurisdiction, as well as goals and strategies already in place. This understanding can expand the parameters of what is possible for TOC/JD and engender strong support from government and community stakeholders.

Among the key stakeholders in TOC planning and implementation are property owners and developers in the station area. For some projects, TOC planning may occur without developer involvement. Alternatively, developers may be active participants in the planning process where they are seeking approvals, or where transit agencies pursuing JD projects opt to select a developer early in TOC planning to obtain their expertise.

The following identifies a range of community scenarios and public engagement methodologies that may be applied:

- In communities that already have a traditional neighborhood configuration consistent with TOC form, the community should be encouraged to sustain that form, to encourage redevelopment consistent with it, and to optimize the orientation of development to transit. In such communities transit agencies may consider further developing relationships that work toward enforcement of existing conditions, or further build upon these conditions through zoning and other practices. These may include density increases using concepts such as accessory dwelling units (ADUs), prohibiting down-zoning, in-fill and blending fringe areas with appropriate development styles, requirements to maintain affordability, and complete streets.
- In communities not familiar with TOC benefits and concepts or those that have developed with a largely auto orientation, an activist approach may be needed to encourage support and planning for TOC. The following four-step process is a potential framework to be applied in working to implement TOC:
    1. Education
    2. Visioning
    3. Land use planning and zoning
    4. Implementation

The first step in this suggested process is to educate local stakeholders so they are open to the idea of TOC and are willing to pursue a visioning process. In the visioning phase, stakeholders—including municipal leaders, residents and business owners in a community—seek to review and evaluate options for land use

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development or redevelopment of their transit station area. If a TOC vision is defined, then the next step is to specify land use plans in the municipal master plan and zoning that provide the legal framework that allows for TOC. Once the zoning is in place, TOC development can be implemented.

It is important to note that planning for TOC may depend on the starting context. An appropriate specific or district plan or zoning may already be in place, facilitating further engagement and planning. These plans typically account for other supporting infrastructure, such as utilities. However, in other cases, a new transit line or station may be introduced in a location without the appropriate planning framework, meaning that this process needs to start from the beginning. In this case, the discussion needs to more broadly cover other requirements, such as studies, design, and eventually construction of other supporting transportation and utility infrastructure, with potential funding sources identified.

The following sections are intended to provide guidance for undertaking a TOC implementation process.

3.3.1 Education and visioning

The education and visioning phases are closely related and should ideally be pursued in a continuum of activities. In the education phase, municipal leaders, including elected officials and the public, learn about TOC and its benefits. Education can take many forms, including distribution of literature; presentations to small or large informal gatherings in the community; presentations at official municipal meetings, such as planning board or city council meetings; and visual preference surveys.

The aim of the education phase is to obtain a willingness among stakeholders to advance into the visioning phase. If the education phase is successful, then the community is willing to plan for the future and explore the opportunities and features of TOC in its transit station area. Transit agencies should provide information regarding TOC benefits as part of this phase and actively participate on the project team.

The following strategies can assist in guiding education and vision planning efforts:

- **Use fact-based education materials.** When discussing development projects and transit investments, there are often myths that need to be debunked. The experience of other places can inform expected outcomes.
- **Use a wide variety of media products to communicate with diverse stakeholder groups.** Stakeholders' grasp of planning and design issues varies widely, and they have different levels of comfort with drawings, models and text. Therefore, it is helpful to use a full range of media, both virtual and physical. As needed, information should be provided in additional languages based on community demographics.
- **A flexible framework for redevelopment is essential.** The plans and implementation strategies must be able to accommodate changes in the development marketplace and be able to exploit opportunities for visible short-term successes.
- **The process must enable stakeholder participation at several levels.** As in any planning process, stakeholder commitment will range from ongoing participation to nothing more than attendance at final meetings. The process should be transparent and ensure maximum communication among these groups. Multiple layers of interaction—from small technical working groups to the general public—are likely to be constructive. Charrettes, where stakeholders work with planners, architects and engineers, have often been successfully employed to engage the public in the planning and design process.

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- **The process should be iterative.** The process should be a dialogue and loop back between technical research and community input. The research conducted by the technicians should be informed along the way by meaningful stakeholder input on the important questions that need to be answered. This will also be the most efficient use of resources. Stakeholders should be kept informed about how their input shaped the outcomes. If the agency asks for the community's vision, it's important to make sure that it is interpreting that vision correctly.
- **The process should be convenient.** Times to meet with the community need to be convenient and should target everyone, especially those for whom transit is a critical need.
- **The process should be inclusive.** The process must recognize that a one-size-fits-all approach will not work and use strategic methods to engage hard-to-reach populations (minority, low income, limited English proficiency, disabled, seniors).

3.3.2 Considerations in planning the visioning process

The transit agency should be a full partner if not a leader in planning the visioning process (see Section 3.3.2.3). The key goal of the visioning phase is to obtain a consensus among stakeholders and decision-makers that a TOC will be part of the community's future. The visioning work in each community should be planned so it is based around the unique institutions, stakeholders, physical attributes, transit facilities and services of the station area. The following sections describe some of the factors to consider in planning the visioning process.

3.3.2.1 Operational or infrastructure service, maintenance, and safety requirements

The transit agency's needs should be identified early as parameters within which the visioning should take place. This is critical to avoid a situation in which the transit agency's requirements come into opposition with a vision that the community has coalesced behind. To do this, there needs to be a proactive effort within the transit agency to define the current and future functions and parameters to share with stakeholders and the public.

3.3.2.2 Receptivity to mixed-use and walkable development

Land use plans and zoning in much of the United States are based primarily around Euclidean zoning and the assumption that automobile access is the predominant mode of transportation. This is often the case in areas that already have transit stations, as well as areas where new transit services and stations are planned. At the onset of the visioning process, it is important that participants are open to moving away from separation of uses to a mixed-use configuration.

3.3.2.3 Leadership

The role of the community's leaders, elected and otherwise, should be considered. Where possible, identify champions who will work to promote the advancement of TOC. In addition, it is important that stakeholders recognize that the community is making the decisions to advance the TOC voluntarily. Where stakeholders come to feel that outside entities—developers or the transit agency—are controlling the development process, support and approvals for TOC may recede. The transit agency and/or developer should, at most, facilitate the visioning and planning processes that the community and its elected leaders decide to pursue.

A potential approach is to form a coalition of partner agencies, nonprofits and residents who have their own goals and strategies that align with the transit agency's. Recurring meetings could be scheduled to hear from coalition members, align strategies, and obtain support and buy-in from members, who will take information back to their respective agencies and constituents.

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3.3.2.4 Cycle of elections

Land use changes often can be contentious issues and may provoke opposition even where a consensus exists around the idea of TOC. Time the visioning stage so it does not become entangled in a partisan political process.

3.3.2.5 Funding for visioning processes

Comprehensive visioning work requires the services of a range of planning, architecture, cultural strategy, engineering, financial and development professionals. Adequate resources should be secured for the planning and visioning before starting work to ensure that the process can be pursued comprehensively and completed to the satisfaction of the community's stakeholders. Transit agency partnering in funding the vision planning can provide the agency with an opportunity to assist the community in guiding the process. In some situations, it may be appropriate to provide financial support for stakeholder involvement.

3.4 Potential components and steps in visioning

Vision planning typically involves an intense work program with a community's leaders and/or planning board. In addition, meetings with a steering and/or stakeholder committee may be appropriate to involve members of the public who represent a concerned interest group or neighborhood. Furthermore, substantive public engagement should communicate to the public that their concerns and recommendations are a key component of the visioning process and the planning recommendations. The transit agency can assist the community in managing and defining the tasks and components of the visioning process. If the transit agency is actively involved in encouraging TOC and/or is working on a specific joint development site, it may have staff dedicated to working with communities, and it may participate as a funding partner in the visioning process. Whatever role the transit agency takes in visioning, it can assist the community in defining a comprehensive process in scale with the institutional and public environment.

The following are among the tasks to be considered in the preparation of a scope of work for visioning. These tasks can be suggested to the community for their consideration as they define and adopt their own scope of work for visioning and planning. However, this list of tasks and the order in which they are listed are not meant to be prescriptive. It is intended to assist in the development of a scope to be managed by professional staff that will provide flexibility and allow for an iterative process that results in public confidence in the outcome of the visioning phase.

3.4.1 Institutional and public process

At the outset, those managing the vision planning process should define the outreach process that will involve the appropriate community institutions and the public. In this effort, the key stakeholders should be identified, and the structure of involving them and the public should be selected. The goal should be a transparent public process that provides participants with the information they need and confidence in the results. The process should include strategic efforts to include hard-to-reach populations in the visioning process. Agencies should refer to their Public Participation Plans for guidance. Early in the visioning work, the participants should discuss and define goals, objectives and constraints so that all involved understand the aims and conditions related to the effort. Throughout the visioning process, the goals, objectives and completed tasks should be reviewed so participants are reminded of the progress that has been achieved.

3.4.2 Goals and objectives

As the visioning phase is initiated, it is useful to establish an understanding among the stakeholders regarding their individual and shared goals and objectives. This is important in establishing a transparent process that will lead to trust and respect among the parties. This may also enable the participants to recognize that there are likely more overlapping and shared goals and objectives than conflicting ones. Goals and objectives can include a range of factors, including financial, economic, social, transportation and urban design factors.

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Another aspect of determining goals and objectives relates to identifying the desired outcomes of the visioning process: Will it be a new land use plan to be adopted by the municipal entity with regulatory land use control, or a set of development guidelines specific to one or a number of TOC/JD sites?

3.4.3 Baseline

At the start of the visioning phase, it is useful to define for the stakeholders the extent and type of development that existing land use zoning will permit. This will provide a baseline against which to compare the TOC options. Examples in their own community of the types of existing uses that would result from the status quo zoning often will inspire a willingness to consider a TOC.

In addition, the baseline work should include a review of existing land uses, buildings, facilities, infrastructure, utility capacity constraints, environmental constraints and opportunities, historic buildings and districts, parkland, transit system considerations, market conditions, and economic development policies. Understanding the baseline will also help determine what the desired outcomes/goals of the visioning process may include.

3.4.4 Examples

Early in the visioning phase, the stakeholders should be exposed to examples of TOCs that are at a scale and in a setting similar to their station area. Photographs may suffice, but it may be preferable to take a trip to one or more TOCs located elsewhere along the transit system or in another region to experience the features of the neighborhood and to meet with local leaders. This can provide a real-life example of how another community planned and developed TOC. A review of examples of TOC at the start can lead to an understanding about the implications of density and mixed-use development that can set the stage for the development of concepts during the visioning process.

3.4.5 Community assets and needs

Most stakeholders have an affinity for the positive features of their community. It is important to identify these early in the visioning process to define for the participants a shared understanding of the context for the visioning for the TOC. As the stakeholders appreciate the assets of their community, the visioning process should also seek to identify needs that a TOC could include to improve the quality of life in the community. The creation of a walkable community center where people can socialize and congregate is often seen as an unmet need in suburban communities. In some neighborhoods an unmet need may be rehabilitation or renovation of public infrastructure.

Other needs that may emerge during visioning could include public spaces (a town square or green), public institutions (library or town hall), retail establishments (restaurants, ice cream vendors), office buildings (anything from modest professional offices to corporate-scale office space), renovation of historic buildings, cultural facilities, and educational facilities. There may also be an opportunity to secure community benefits through various agreements. In addition to those listed above, these could include local employment opportunities related to either construction of transit infrastructure or the TOC itself.

3.4.6 Transit infrastructure and operations

The more intense development associated with the TOC may indicate the need for rehabilitating, upgrading or expanding the transit facility. The overall transit operating environment, including how transit will operate during TOC construction, the need for bus layover space for bus service, and the ability to expand to meet future demands arising from transit system growth should be assessed. Where a development project is being planned, the transit agency should actively engage with developers of parcels adjacent to transit facilities so they understand the needs of the transit agency as well, particularly if expanded or additional facilities are

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needed to accommodate ridership growth. Parking often is a major component of the transit station and TOC that warrants particular attention.

Where the planning of TOCs is proposed to justify a transit system extension project, a baseline level of development should be established. Development density thresholds for households and jobs should be established to achieve a sufficient return on investment in the transit infrastructure. In addition, ridership thresholds and walkability measures for station areas can also be criteria for evaluating system expansion projects. It is important to use walkshed analysis and precise modeling tools to truly understand the catchment area and demand around stations. Small non-street connections can make a significant difference to walkability, and demand can be better understood when approaching local development and design at a local rather than regional scale.

3.4.7 "Bones" and transit access infrastructure

Many planners suggest to communities that they define the "bones," or street and utility infrastructure configuration, around which future development or redevelopment can occur. These may be based on the existing infrastructure or property lines. Often for TOC development, streets are added to create a more fine-grained grid pattern that defines the framework needed for a walkable, human-scale neighborhood. The "bones" should allow for a variety of uses and building types. The actual uses and architecture will depend on conditions at the time development occurs.

Traffic and parking impacts will need to be considered as the vision plan evolves. These are often among the most contentious issues faced in the TOC planning process. Therefore, surveys of existing traffic, parking, feeder bus/shuttle, pedestrian, bicycle, micromobility and drop-off/pickup conditions may be early tasks as the road network "bones" are being shaped. Micromobility includes scooters and sharing of bikes and scooters. Drop-off/pickup includes traditional drop off/pick up zones and taxi-like services provided by ride-hailing or transportation network companies, such as Uber and Lyft. Considering the multimodal nature of transit stations, it may be useful to define them as a community mobility hub that is a multiuse community asset.

Specific emphasis should be placed on access routes and modes to the transit facility. FTA guidance defines the pedestrian walkshed as one-half mile from the facility and the bicycle walkshed as up to 3 miles from the facility. As part of the visioning process, infrastructure needs that will promote bus/shuttle, walk, bike, micromobility and drop-off/pickup access to stations should be identified and included in plans. Ideally, before transit facilities are even placed into service, the underlying multimodal access network should be well in place to provide safe, convenient/direct and comfortable access to the station. Infrastructure not only includes sidewalks, curbside access, connectors and bike lanes, but also lighting, wayfinding, street furniture and tree canopy. Conducting multimodal—including bicycle and pedestrian—safety and access audits of transit access routes will help to identify challenges. The APTA Recommended Practice, **Design of On-Street Transit Stops and Access from Surrounding Areas,** provides guidance for planning access to transit in TOCs.

3.4.8 Market review

As a community defines its vision for TOC, market conditions should be evaluated at both the regional and the neighborhood level. Private sector investment by developers will involve more intense market analysis than needed for visioning, but a review of market trends and potential can help the visioning stakeholders in selecting uses for their TOC vision. The market review will provide input for financial analysis as the vision plan is defined.

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3.4.9 Vision plan options

Based on the preceding tasks, a range of development scenarios should be identified as potential examples for discussion. At a sketch planning level, the components and performance (such as traffic impacts) of the options should be enumerated. The aim of this effort is to draw out reactions and opinions with the goal of screening out development scenarios that are not desired and focusing on a small number of options for more detailed evaluation. At this point, the scale of development should begin to come into focus. In addition, there is likely to be a list of infrastructure requirements and public amenities that will be needed and are desired for the TOC.

3.4.10 Economic and trade-off analysis

The remaining vision plan options feasible in the market analysis context are likely to include the need for public and private investment. In many communities, tax impacts may be of great concern. A sketch-level analysis of the economics of the remaining options should be developed to identify private sector financial feasibility and public sector tax impacts. This analysis should consider both capital investment and ongoing annual costs for the community (such as security, maintenance, education, etc.), as well as for the transit agency if new or expanded infrastructure and services are related to the TOC. This analysis also should identify the potential for generating private sector revenues for infrastructure (including traffic-related improvements) and amenities, and review other potential funding sources, including the public sector.

One of the public sector funding sources to consider is tax increment financing (TIF), in which anticipated increases in future tax revenues finance borrowing for capital improvement. TIF is particularly applicable for TOC projects, since such projects typically result in more tax revenue than would have been generated with non-TOC land uses.

Other public sector financing sources may be available from federal, state, district or county programs. They could include a wide range of federal programs, along with funding sources for affordable housing, such as the HOME Investment Partnerships Program. Priorities for accessing these funding sources are generally set at the municipal level, another reason that aligning TOC vision and goals with stakeholders is critical. Funding sources for ongoing operating and maintenance needs may include business improvement districts or other public/private arrangements.

This analysis can be a significant task if the community is considering the use of complex tax- and revenue-generation techniques. However, the limitations of the potential revenues should be estimated, and a trade-off analysis should be performed to determine the infrastructure and amenities that will be financially feasible. This analysis should consider life cycle costs for both the public and private sector to ensure that the development and related transit facilities have long-term viability. Although this may be a complex analysis, it will be important to provide a transparent explanation of the tax impacts and the trade-off analysis so the stakeholders and the public understand the financial implications of the TOC.

While this trade-off analysis is important and is particularly critical for larger projects, this step may not be necessary for smaller urban infill projects and/or projects with significant community benefits, such as affordable housing or other community-serving uses. These smaller projects should be scrutinized in terms of development costs and a reasonable sale/ground lease value but may not hold up to standard cost-benefit analysis due to the non-economic (public serving) benefits. Additionally, such analysis may simply take up time and add costs for a project that all parties agree will move forward.

3.4.11 TOC vision

Based on the foregoing tasks, a recommended vision plan, around which a consensus has formed, will emerge. The vision plan should provide the community with a conceptual framework around which it can

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write zoning regulations. It should illustrate the benefits the TOC will contribute, while also indicating how impacts will be managed. The plan should be flexible enough to accommodate market conditions at the time of implementation. The vision should draw on the evolving menu of sustainability practices that will optimize the TOC for the long term.

3.4.12 Development form guidelines

A desirable output of the visioning process is the preparation of guidelines that will be used in the zoning of the TOC and in the design of the form of the TOC. A technique that is increasingly being applied in zoning regulation is "form-based code." If the baseline analysis determines that allowance of greater land use flexibility is necessary to promote TOC, then the development guidelines that are prepared as part of the vision plan can be the first draft of the form-based code that the municipality considers in the land use planning and zoning phase. If TOC-supportive land use regulations are already in place, detailed development or design guidelines can be influential in providing stakeholders with a clear understanding of the form and density of the potential TOC site in question, including illustrating its configuration within the context of existing neighborhoods.

3.5 Summary

As the tasks listed indicate, TOC vision planning can be one of the most complex public planning initiatives a community undertakes. Whether the effort is focused on an existing station or a new one, it usually involves changing the development pattern and land uses planned for the future. It should be based on a comprehensive understanding of baseline conditions and community culture. If successful, visioning will involve a combination of education, exploration and analysis of possibilities to provide a sound result for the community and transit agency.

4. Guidelines for transit agency joint development

Joint development initiatives require the establishment of effective partnerships. Win-win solutions have the potential to increase the value of a project. However, creating win-win solutions requires each party to understand the interests of the other participants and to be willing to compromise on non-core issues.

4.1 Setting goals for JD programs and processes

When deciding to pursue a joint development program or actively support local government or private sector TOC projects, transit agencies should establish clearly articulated goals and objectives. Frequently cited goals include the following:

- **Generate revenue for the transit agency.** Although some agencies have had success in generating revenue, each site is unique and requires a comprehensive economic analysis. JD projects often involve infrastructure costs related to stations, stops, transit rider parking and other transit facilities. Among the questions to be addressed in the economic analysis is whether the land value and potential development density and mix of uses will be adequate to address those costs as well as generate income for the agency.
- **Increase ridership.** It is important to determine the expected modal split of drivers to transit, in order to ensure that those depending on this mode to access transit are accommodated, without providing excess parking for other purposes. Not only the number of parking spaces, but the type (e.g., resident, employee, retail, visitor, shared, free or paid) can be adjusted to strike this balance. With appropriate site design, diversity of uses, and job and housing densities, an increase in system ridership is an achievable goal. Where the JD will use existing transit rider parking lots, the form and density of development (including transit rider parking) should be adequate to at least maintain ridership, if not increase it.

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- **Promote transit-oriented communities.** The concept of TOCs is becoming a regular part of the dialogue among transportation authorities, their municipal partners and community stakeholders. A TOC is an approach that looks beyond the individual station or TOD site to create compact, walkable and bikeable communities centered on transit. The TOC emphasis expands the goals of station area planning and individual development projects to include additional community benefits, including affordable housing; neighborhood-serving retail; community businesses such as markets, gyms and healthcare providers; and infrastructure supporting active transportation. These added goals can support much more expansive increases in ridership potential.

Regardless of the goal(s), transit agencies should remember that value capture/creation can take many forms and that it is important to have realistic expectations about what is achievable. Beyond these general goals for JD, agencies should specify specific goals, similar to those articulated in Section 3.4.2.

4.2 Steps in the joint development process

The sections that follow are guidelines to help transit agencies navigate the joint development process. While the guidelines are listed sequentially, they are not discrete processes and should be considered at each stage of the joint development process.

4.2.1 Pre-development checklist

Before proceeding with a joint development project, the transit agency should establish a checklist. Pre-development is a critical stage, as it provides project definition and helps to create as much certainty in the process as possible. This would include station access plan/needs assessment and identifying the economics of a project—an agency should know if a project is feasible from a market and economic standpoint. If the project requires subsidy, that should be explored with funding entities prior to initiating. (Refer to Section 3.4.10 for more consideration of these pre-development analyses.)

4.2.2 Joint development offering process

4.2.2.1 Principles to consider

Traditionally, transit agencies gear their procurement processes toward the acquisition of capital equipment, architectural and engineering services, and construction services. While these procurement processes may work for some joint development offerings, the development community typically is not accustomed to them.

It is advisable for agencies to engage the local development community before settling on an offering approach. In general, joint development offerings should be as flexible as possible, both in terms of procurement procedures and in terms of submittal requirements. The more prescriptive and onerous the offering process, the less attractive it is likely to be to the development community and the less potential there may be for developing creative solutions. However, providing maximum flexibility can have its drawbacks in highly contentious communities that are experiencing displacement. The community stakeholders may want some boundaries and definitions on the offering. If done properly it can reduce risk for the developers in the long run and not discourage development in the short run. Before starting the JD process, a transit agency can determine the best approach by working with the local municipality, key stakeholders from the impacted city and community leaders.

Another reason for engaging the local development community is to gain an understanding of current market conditions. The state of the market will determine what kind of project the transit agency offers and when it offers the project.

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Before the selection process begins, the transit agency should define its offering policies and set criteria for selecting developers. One of the offering policies that may impact developer interest is future ownership of the development site. Some agencies have sold property for joint development, and others have retained ownership by entering into a long-term ground lease. Selection criteria can include design excellence, cost benefits, density and financial capacity. The transit agency may consider creating development guidelines to accompany the RFP or offering.



Ground Lease, Property Sale or Both?
Ways Agencies Facilitate Joint Development

Sound Transit's joint development approach at the Capitol Hill Link Station TOD used three ground leases for its market rate components while selling off land for a 100% affordable housing building. Connection on Broadway is the market-rate component that has 319 homes (67 affordable) and 3,500 square feet of retail, which was delivered by developer Elden & Co through the ground lease with Sound Transit. Station House is a 100% affordable, 110-home building where the land was sold to and developed by Community Roots Housing.

More information can be found here: https://www.soundtransit.org/system-expansion/creating-vibrant-stations/transit-oriented-development/projects/capitol-hill-north.

4.2.2.2 Structuring the RFP

The RFP process is expensive and time-consuming for the development community, so the approach chosen can have a direct impact on the number and quality of proposals for a site. There are benefits and challenges to both a one-step RFP and a two-step RFQ/RFP process when procuring a developer. Regardless of the approach, a transit agency should seek to understand the capacity (both financial and project management/ delivery) of a development team, as well as the design and architectural vision for a site, before selecting a development team. One way to procure the information sought and still minimize developer expense is to

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structure the competitive process such that it focuses on three key aspects, which can be considered in either a one-step or two-step procurement process:

1. **Proposed development team:** Transit agencies can seek to understand key members of the proposed development team, their qualifications and related experience developing projects of similar magnitude. The team would likely consist of a lead developer, an architect, a landscape architect, attorneys, land use/entitlement specialists and financing partners. The transit agency can ask for examples of completed projects that members of the team worked on, including the total project costs and date of completion.
2. **Architectural vision for the site/precedent projects:** An initial request may forgo a detailed design submission but rather seek an understanding of the team's vision for the site, including a potential mix of uses, densities and architectural styles. Transit agencies may ask for precedent images of projects that emulate the vision, and/or examples of work that the team (or members of the team) have completed that exemplify their vision and stylistic approach.
3. **Financial capacity:** Transit agencies should require proposers to submit information that fully demonstrates their financial capacity and readiness to develop the site. The focus should be on their track record in structuring public/private partnerships, relationships with financial institutions and general good-standing record. To demonstrate this capacity and track record, transit agencies may ask the proposers to describe examples of public/private transactions completed in the past five to 10 years, as well as relationships with financial institutions. In 2015, LA Metro's North Hollywood Station request for interest and qualifications (RFIQ) requested that the proposer describe the following:
    - Three completed public/private transactions, including sources and uses of funding, any public financing/subsidy sources, and other relevant information about the team's ability to structure and finance public/private transactions.
    - Current relationships with debt and equity providers. This could include reference letters from previous lenders and/or equity providers.

Note that this streamlined process does not request a detailed financial proposal upfront; such a proposal cannot realistically be developed without a more fully developed concept plan for the site. The level of architectural study, construction estimates and pro forma modeling required to create a detailed financial proposal defeats the intent of saving developer expense upfront and/or may result in a proposal that will change dramatically once the project is more fully formed.

Structuring the competitive process with an initial emphasis on the three areas of focus described above, the transit agency can create either a one-step or two-step RFP. In the one-step scenario, a team is chosen based on the three qualifications, and then a more detailed project concept and financial proposal are developed in the negotiation stage. This eliminates much of the upfront risk for the developer, as it will be investing its pre-development funds in a project site that it has been awarded. However, there is more risk for the transit agency, as once the team is selected there is no longer competition, and the financial offer is not known.

For the two-step RFQ/RFP, the three qualifying factors are used to create a short list, and the short-listed developers compete by providing the detailed concept plan and financial proposal. There is a slightly higher risk for the developers, as they must develop more detailed proposals and may not be awarded the site, but there is still less risk due to the short list, and most developers that deal in public/private transactions are accustomed to this component of the process. The transit agency has the benefit of being able to compare proposals to determine which combination of team, vision and financial proposal best meets its overall goals for the site.

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Other key factors to consider when structuring the RFP are the marketability, size and likelihood of competition for the site. It will be up to the staff of the JD department to make the determination based on the available facts, the status of the market, and in some cases counsel from trusted advisers or consultants.

4.2.2.3 Unsolicited proposals

As agencies define their selection procedures, they may want to retain the flexibility to select developers that come in through an unsolicited proposal. For instance, a developer that owns adjacent property may be interested in expanding a project onto an agency-owned parcel and propose a joint development. These proposals can be considered as long as federal guidance on unsolicited proposals is followed. This guidance can be found in FTA Circular 4220.1.F. The joint development department of the Los Angeles County Metropolitan Transportation Authority (LA Metro) adopted a revised Joint Development Policy in June 2021, which provides an example of how to manage unsolicited proposals in line with federal competitive procurement requirements. That document can be found here.

4.2.2.4 Post-selection negotiations

Once an agency selects a developer, the developer and agency might consider establishing a preliminary agreement with the intent to negotiate that defines the process to reach a final agreement. These agreements can include an exclusive negotiating agreement (ENA), a letter of intent (LOI) or a memorandum of understanding (MOU).

The preliminary agreement outlines the roles and responsibilities of the respective parties while they negotiate a formal development agreement, which can occur concurrently with the preliminary site design and preliminary city approval process. A preliminary agreement provides the benefit of providing a level of certainty to the developer while requiring it to meet certain milestones as a precursor to finalizing a development agreement. Involving appropriate stakeholders at appropriate times at this stage should give all participants the opportunity to resolve outstanding issues and to improve the odds of achieving support for the development plan and development agreement. In the end, establishing effective partnerships with the appropriate stakeholders should reduce complications and decrease the time necessary to deliver a joint development project.

4.2.3 Federal Transit Administration Coordination

Transit agencies should have a thorough understanding of all applicable state and federal regulations at the earliest stages of the joint development process. This includes but is not limited to FTA grant management guidelines, FTA joint development guidelines, applicable NEPA and state environmental requirements, and applicable state and federal procurement regulations. If a proposed TOC involves federal participation in land or joint facilities, the FTA must be consulted and ultimately approve the transfer of the federal asset and development agreement.

When to bring the FTA in for consultation and review of joint development initiatives is less clear. On process and procedural issues, it makes sense to talk with the FTA at the earliest possible time. It would be unproductive to develop internal procedures or an offering process inconsistent with FTA policy. On the other hand, talking with the FTA about a specific project before the transit agency has sufficiently developed the concept may not be productive either. Like early community stakeholder integration, the goal of early coordination with the FTA is to develop buy-in and to prevent unpleasant surprises late in the process.

4.3 Joint development program development guidance

Several transit agencies have experience in implementing joint development projects. Among the most experienced is the Washington Metropolitan Area Transit Authority (WMATA), which overhauled its joint development program guidelines in 2007 and has periodically updated its guidelines to align with evolving

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transit and development needs. The most recent revision was amended in 2025. Appendix A provides a review of WMATA's 2025 program evaluation and a summary of the current joint development policy. The following guidelines are based on WMATA's policies.

4.3.1 Program purpose

There are several reasons to develop JD guidelines, not least of which is to ensure a common understanding of the program goals and objectives among stakeholders such as developers, local jurisdictions and the community. WMATA's guidelines cover processes for the following:

- disseminating program information
- identifying roles and responsibilities
- establishing site marketing procedures and developer selection
- replacing transit facilities
- ground lease versus sale to local jurisdictions
- the community outreach process
- evaluating and estimating JD project benefits (cash value, development of new transit facilities, etc.)
- handling unsolicited proposals and special situations.

4.3.2 Goals

The goals of joint development projects include:

- Promote TOC by prioritizing joint development proposals that adhere to smart growth development principles, including reducing auto dependency; increasing bicycle- and pedestrian-originated trips; fostering safe station areas; enhancing connections to surrounding areas; establishing higher densities near transit; providing mixed-use development; promoting the ability to obtain goods and services near transit; and offering active public spaces.
- Increase ridership, including in the reverse-commute directions and in off-peak periods, targeting underutilized transit capacity.
- Where appropriate, support establishment of employment centers consistent with TOC design principles and transit system operating and investment needs.
- Implement station access improvements (pedestrian, bike, bus, ADA, auto) to ensure good first- and last-mile access with particular station needs determined by agency station access planning efforts.
- Improve and enhance infrastructure whenever a project impacts transit facilities, ensuring that transit performance and operations remain functional.
- Generate additional revenue.
- Support other transit agency goals as they may arise, including affordable housing (subject to agency board's adoption of policy governing application of this goal) and sustainable design practices. This shows consideration of broader system needs.

4.3.3 Standards

Station access planning should be done according to agency standards for replacement facilities. Conflicts between standards and project goals should be identified and solutions proposed.

4.3.4 Roles and responsibilities

There are many stakeholders involved in the joint development process, from the agency's governing entity and its staff on the inside to local government, private sector and communities external to the agency. Guidelines should lay out the roles and responsibilities of each. WMATA's guidelines lay out this detail for the board of directors, general manager and staff, local jurisdictions and compact signatories, developers, and the community.

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Agency staff roles include the following:

- **Local jurisdictions:** Agency staff members should meet with local jurisdictions and potentially affected communities before soliciting development proposals. Discuss key issues, including economic factors and impacts.
- **Community representatives:** Identify and meet with community groups to obtain their input and establish ongoing communications about the TOC project.
- **Developers:** In coordination with the agency, it may be advantageous to have selected developers plan and construct, typically at their own expense, any and all required replacement facilities at the JD site.

4.3.5 Joint development objectives and procedures

Best practice objectives and procedures for pursuing joint development projects include:

- Before soliciting developer involvement, create as much developer certainty as possible via early planning in conjunction with stakeholders as to land use and station access.
- Streamline the proposal process as much as possible.
- Have flexibility to match the developer selection process to transit needs and site specifics, incorporating fiscal impacts and benefits into an overall assessment of the project's economic, operational and functional benefits. Developers need to have a good idea as to transit provider needs.
- Use the station access planning process to build value via transit development projects. For example, shared parking reduces cost, can be co-funded, and provides more space for development.
- Use all available approaches to maximize development industry interest and awareness, including use of private partners, agents and/or brokers where appropriate.
- Promote TOC practices, including placemaking.
- Be prepared to use a range of contract types in formalizing relationships with developers. Each agency and project are likely to have unique conditions that should be considered. Leases, sales and condominium arrangements are possibilities to consider. Where the FTA has an interest in the property involved in a development project, the agreement will need to be in conformance with its requirements.
- Collaborate in the design process with the developer.

Please refer to Section 5 for case studies.

4.3.6 Station access planning

Access to and from a station is critical both to promoting ridership and to ensuring that TOCs are in fact oriented around and supporting transit use. Depending on the status of the transit station, there are a few approaches that a transit agency's JD staff can take:

- **Station in design:** If the transit agency is engaged during the initial planning for a station area, it should be part of a station access planning analysis focused on active transportation and pedestrian and ground-floor circulation. The JD staff should also ensure that any portals and related transit infrastructure are placed so as to maximize the ability to use excess station area property for commercial development, and they should be cognizant of how the station orientation complements existing uses in the area and supports new development opportunities.
- **Station already designed/built:** If the transit agency is engaging in JD activities for a station already designed/in use, station access planning can study the existing active transportation infrastructure and connections to seek recommendations for improvements that can be built into a new commercial/residential development. Site planning studies can also identify siting potential based on the existing transit infrastructure and may identify opportunities for changes to the station area that will better promote access and integrated commercial development.

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At any stage, station access planning should be conducted with local planning staff and the community to understand how riders will (or do) access the station and determine infrastructure improvements that may need to occur to address any changes to the site configuration as a result of the new development footprint.

4.3.7 Further assessment

Additional factors that should be addressed include:

- Assess whether current zoning/jurisdictional plans align with the station access plan.
- Assess market readiness.
- Establish detailed processes for conducting solicitations (including RFPs and RFQs). Tailor evaluation criteria and selection procedures to each procurement approach.
- Ensure that a project complies with the local jurisdiction's affordable housing laws and aligns with housing goals.
- Establish standards to ensure that the project is sustainable, with attractive urban design and high-quality construction.
- Ensure that construction management planning takes place, including provision of existing transit services and pedestrian, bicycle and parking access as much as possible.
- Evaluate whether it is advantageous to have another organization manage parking.
- Define a policy for parking displaced by joint development of parcels currently used for passenger parking. This policy may vary by site considering passenger demand and site-specific station access options. In some locations, reducing parking may be satisfactory to facilitate TOC goals. In other locations where park-and-ride demand is significant, the agency may seek both replacement and expansion of parking. In addition, to the extent that existing transit parking was required pursuant to a NEPA/federal environmental document, any reductions to parking must be cleared through the FTA. Generally this can be accomplished by providing data on parking utilization rates.
- Define project funding plans that consider public and private funding sources.
- Ensure fire-life safety considerations, including access for emergency vehicles.

It may be desirable for agency staff to participate cooperatively in local planning processes to advocate for TOCs.

5. Case studies of transit agency TOC and JD programs

As transit agencies, municipalities, MPOs, developers and others become increasingly interested in coordination of land use and transit, an increasing number of TOC and JD programs and projects are being pursued in North America. TCRP Report 102, issued in 2004, describes case studies of metropolitan areas and references the public involvement and visioning process that facilitated the implementation of the TOC. That report provides case studies for Boston; New Jersey; Washington, D.C.; Miami–Dade County; Chicago; Dallas; Colorado; Portland, Oregon; the San Francisco Bay Area; and Southern California.

The sections that follow provide a brief overview of recent TOC initiatives being pursued by transit agencies. Examples of effective transit partnerships can be found in Appendix B.

5.1 Washington, D.C.

Appendix A of this document provides an overview of the WMATA joint development policies and guidelines, reflecting a general update based on the 2025 Joint Development Program Guidelines and the 10-year Strategic Plan for Joint Development. The policies emphasize the importance of community outreach, noting that engagement should be scaled to the specific institutional and public context of each station area. While not prescriptive about specific outreach methods, the guidelines assign primary responsibility to developers, with WMATA providing support as appropriate.

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5.2 Chicago

Since 1998 the Regional Transportation Authority (RTA) has been proactively promoting TOC in the Chicago region by providing technical assistance through its Community Planning program. A call for projects is issued to local government units each year for planning studies that will benefit both the local governments and the RTA transit system and support the RTA's Strategic Plan. Station area and TOC studies are the most common type of study conducted through the program, but the program also offers technical assistance to complete transit corridor studies, curb management studies and planning for mobility hubs.

Staff from RTA and its service boards (CTA, Metra and Pace) participate in the planning process for each of these studies, providing technical feedback on study deliverables, which often includes a real estate market assessment, a circulation and access plan, design guidelines, a TOC concept plan, and implementation strategies. These plans are used by local governments to guide and manage development and redevelopment within the station area while integrating the transit facilities and mobility improvements into their land use plans. In preparing these plans, the RTA strives to achieve three main goals:

1. Provide community residents and officials with an awareness of the benefits of supporting compact, walkable, higher-density, mixed-use development within the vicinity of their transit station.
2. Develop a transit-oriented development plan/guide for the community and private developers to follow while planning, designing and implementing new land use or transportation projects in the station area so the final build-out is cohesive.
3. Develop and foster partnerships and relationships among service boards, community officials, regional agencies, private developers, residents and business owners that will assist in streamlining the implementation of the final plan.

The RTA also supports plan implementation activities in the following ways:

- Preparing zoning code amendments for municipalities that allow the type of development envisioned during their planning process.
- Providing technical assistance for municipalities to establish financing districts, such as tax increment and special service areas, the funding generated from which can go toward plan implementation activities.
- Pairing municipalities with representatives from the private development sector via a partnership with the Urban Land Institute, to conduct a half-day workshop in which developers provide feedback and strategies a municipality can use to attract development in their transit-served areas.

5.3 Grand Rapids, Michigan

The Interurban Transit Partnership (ITP), formed to operate the public transportation system in the Grand Rapids area known as "The Rapid," is a good example of a midsized bus agency that has formed partnerships in pursuit of transit-oriented communities along BRT corridors. In 2014 The Rapid launched Michigan's first BRT service, the Silver Line, which operates along the South Division Avenue corridor from downtown Grand Rapids, south into neighboring municipalities Kentwood and Wyoming. While South Division has always been one of the highest ridership corridors, much of the land use along the corridor is auto-centric, which posed an opportunity to implement land use changes that would increase the number of places to live and work along the Silver Line and therefore increase the potential for ridership growth.

After BRT service commenced along the corridor, however, developer interest and new economic development proposals remained elusive despite all three municipalities intending to pass zoning code adjustments to support higher density development and more efficient land use. Cognizant of the limited willingness for pursuing redevelopment along the corridor and recognizing its limitations as an agency with

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no land use authority, the ITP sought to solidify its partnership with the three municipalities, with the intent of developing an action plan to help catalyze private investment along the corridor.

Using funding from the FTA's TOD Pilot Planning Program, the ITP and its municipal partners developed a plan for transformative transportation and development change along the South Division Avenue corridor, especially in the BRT station areas. Titled "Division United," the plan offers a framework for pursuing collective action for corridor improvements that would honor the vision and objectives of the residents and businesses along the corridor, while simultaneously protecting the character of existing neighborhoods and business districts. To that end, Division United identifies ways to leverage the Silver Line service on the Division Avenue corridor as an agent for investment, with a focus on fostering affordable housing, accessible employment and diverse transportation options along South Division Avenue from Wealthy Street in Grand Rapids to 60th Street in Kentwood.

Fifteen action items are detailed in the plan's implementation matrix, highlighting the additional partnerships ITP and the municipalities needed to bring the plan recommendations to reality. These additional partnerships include:

- all state, county, municipal and public departments with land along the corridor;
- local businesses and landowners;
- housing developers;
- workforce development boards;
- health and environmental action agencies; and
- historical, cultural and genealogical groups.

The Division United plan was completed in 2021, and implementation efforts, while seemingly slow, are yielding new housing opportunities along the corridor, mostly in the city of Grand Rapids. The city has received funding awards from the Michigan Economic Development Corporation for several development projects along the corridor, including affordable housing units; a mixed-use development with retail, market-rate apartments and a venue for local performers; and senior housing units, all within close proximity to the Silver Line. One notable project is the planned construction of a 56-unit senior housing development wherein the majority of units will be reserved for low-income residents, proposed by a nonprofit affordable housing developer that has assembled federal, state and local dollars for construction.

5.4 San Francisco Bay Area

Among the agencies that are active in pursuing TOC in the Bay Area is the San Francisco Bay Area Rapid Transit District (BART).

The BART TOC program is guided by BART's Transit-Oriented Development (TOD) Policy, initially adopted by its Board of Directors in June 2016 and amended in April 2020. The policy outlines six goals that guide BART's TOD work:

1. Complete Communities
2. Sustainable Communities Strategy
3. Ridership
4. Value Creation/Value Capture
5. Transportation Choice
6. Affordability

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It also identifies five strategies for advancing the TOD program:

1. Managing resources strategically to support TOD
2. Supporting transit-oriented districts
3. Increasing sustainable transportation choices through best practices in land use and urban design
4. Enhancing benefits of TOD through program investment
5. Equitable investment

The program is also guided by performance targets for production of housing, including affordable housing, and commercial uses. BART's TOD Guidelines set design, density and other zoning expectations for TOD on BART property and within the larger station area. The California legislature passed AB 2923 in 2018, which codified these guidelines into zoning requirements on BART-owned property in select counties through the end of 2029. Finally, a Financial Return Framework articulates BART's approach to supporting affordable housing within BART TODs through land discounts.

5.5 Los Angeles

LA Metro has actively encouraged land use supportive of the development of TOC throughout its service area. Included within LA Metro's initiatives is the TOC Policy, which outlines the agency's commitment to considering issues of access and connectivity to the transit system (such as first- and last-mile connections); a deep understanding of the demographics of the customer base (to target and adjust service); safety, timeliness and consistency of service; and the impact of the system on issues of equity and equitable opportunity in Los Angeles County.

Specific TOC goals include (in no particular order):

1. Increase transportation ridership and choice.
2. Stabilize and enhance communities surrounding transit.
3. Engage organizations, jurisdictions and the public.
4. Distribute transit benefits to all.
5. Capture value created by transit.

LA Metro's TOC policy can be found here.

FIGURE 1
Hollywood/Western Station Affordable Housing JD



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LA Metro's Joint Development Program partners with private developers to build transit-oriented developments on LA Metro-owned properties. LA Metro's Joint Development Policy can be found here. A list of completed, active and future JD projects can be viewed here.

5.6 New Jersey

As New Jersey's statewide transit corporation, NJ Transit has worked with municipalities to encourage TOC since guidelines for TOC were issued in 1994, in a document titled "Planning for Transit-Friendly Land Use: A Handbook for New Jersey Communities." NJ Transit has commuter rail, light rail and bus stations and stops in nearly 400 of New Jersey's 564 municipalities, each of which controls land use. In most of these communities, elected leaders serve in a part-time volunteer capacity and often are not aware of TOC planning concepts. In many communities, municipal master plans and zoning are intermittently developed and updated with little consideration for transit and TOC. The result is municipal land use regulations and a decision-making environment that has not planned for or supported TOC development.

Despite the difficult institutional environment, interest in TOC has flourished in many New Jersey municipalities in recent years due to the encouragement and active efforts of NJ Transit, the New Jersey Department of Transportation (NJDOT), and other agencies and nongovernmental organizations. The result is that many communities with transit service have planned for TOC and worked with developers.

To advance TOC planning, NJ Transit has established its "Transit Friendly Planning Program" to assist municipalities with community engagement, education and development of strategic partnerships by providing technical assistance centered around station area planning. The program provides the following support and resources for advancing TOC:

- NJ Transit has partnered with municipalities and other agencies to provide local planning assistance through on-call consultants with expertise in transportation planning, urban design, market analysis, economic development, downtown revitalization, parking and community engagement. The result has been the creation of numerous consensus-based, transit-supportive land use "vision plans" that communities are using to guide development and redevelopment at existing or proposed transit facilities. Local transit-friendly vision plans have allowed NJ Transit to demonstrate how statewide transportation investments enhance the environment, create strong community centers, encourage private reinvestment in the local economy and improve the quality of life.
- With NJ Transit's support the Alan M. Voorhees Transportation Center at Rutgers University has created and maintains the New Jersey Transit Friendly Data Application that allows users to map, report and download a range of land use, travel, public transit, demographic and real estate development data across New Jersey and the NJ Transit network. The latest edition of the application includes corridor planning, TOD opportunity, total water levels and environmental justice tools.
- NJ Transit sponsors New Jersey's Transit Friendly Planning Newsletter at NJTOD.org. Published since 2005, NJTOD.org is designed to keep municipal officials, planners and advocates up to date on new development and redevelopment around transit facilities in New Jersey, the region, the country, and around the world. The newsletter aims to enrich the TOD conversation in New Jersey's diverse communities by highlighting best practices, model programs, new legislation and local problem-solving experiences.

In 2022 NJ Transit released its updated planning guide: "Transit Friendly Planning: A Guide for New Jersey Communities." Like the original publication, the guide is intended to assist community members, elected and appointed officials, members of planning and zoning boards, technical planning staff, community groups, and those who are interested in making land use decisions around transit facilities that assist in improving mobility and access to transit. The guide is designed to cover the fundamentals of transit-friendly planning. Emerging topics such as micromobility, curbside management and complete streets are addressed throughout.

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The guide contains chapters on design, development, access, circulation, parking and active transportation. While the guidance is often general and applicable to all communities, place-type specific information is provided throughout the guide.

Several TOC projects have been implemented and are now being advanced along NJ Transit's system, including the following:

- Based on a vision plan prepared with NJ Transit funding for the Borough of Somerville, the borough adopted zoning for a TOC development on NJ Transit's 31-acre commuter parking lot and underutilized land adjacent to the existing Somerville Station. This set the stage for NJ Transit to solicit bids and contract with a developer to construct a TOC, which consists of 374 apartments, 156 townhomes, parking garages, retail and community spaces, and a new road connecting to a state highway.
- A major project is the multiphase, mixed-use development project at Hoboken Terminal, where multiple transportation modes converge: NJ Transit commuter rail, light rail and bus; PATH rapid transit; privately operated ferry service; vehicular; and bike/micromobility. The project will consist of office, residential, retail and public open space totaling over 1 million square feet of development, including improvements to public infrastructure and the surrounding streetscape. Project construction began in early 2025.
- Work is underway toward development at one of NJ Transit's highest ridership suburban stations, the Metropark Station, which is served by NJ Transit commuter rail and bus, as well as Amtrak Northeast Corridor services. The project will be built in phases and is proposed to consist of Class A office and retail spaces; residential, 20% of which will be designated as affordable housing; community amenities; structured parking facilities; and station-area enhancements, including circulation and access improvements, off-site traffic mitigation improvements, pedestrian and bicycle access upgrades, and renovation of the existing station building and parking facilities.

Complementary to NJ Transit's TOC initiatives, NJDOT created a Transit Village initiative in 1999. The transit village designation is given to interested municipalities after much of the visioning, planning and background work have been completed on the municipal level and redevelopment is poised to begin. As of 2025, thirty-seven station areas have been designated as transit villages. Designation as a transit village provides the municipality with the State of New Jersey's commitment to the municipality's vision for redevelopment, coordination among Transit Village State Agency Task Force, priority funding from some state agencies, technical assistance from some state agencies, and eligibility for grants from NJDOT. More information is available at https://www.nj.gov/transportation/community/village/.

NJ Transit has also actively worked with New Jersey's three metropolitan planning organizations (North Jersey Transportation Planning Authority [NJTPA], the Delaware Valley Regional Planning Commission and the South Jersey Transportation Planning Organization) to advance planning for TOC. A major collaborative planning program, advanced by the NJTPA was its Together North Jersey initiative, a planning effort that brought together a coalition of nearly 100 diverse partners—counties, municipalities, educational institutions, nonprofits, businesses and other stakeholders—to develop a regional plan. The Together North Jersey planning process identified a shared vision for a sustainable future for North Jersey consisting of four themes: Competitive, Efficient, Livable and Resilient. The plan is comprehensive, including a broad range of topics such as housing, education, energy, water, the arts and environmental stewardship, but it is centered on land use and transportation. As part of the Together North Jersey initiative, municipalities and developers were brought together to encourage TOC development, and TOC-supportive vision plans were developed for interested communities.

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Definitions

Euclidean zoning: An approach to regulating land use by delineating allowable land uses and densities, which has traditionally resulted in the separation of different types of land uses. "Euclidean" refers to the town of Euclid, Ohio, where such regulations were first upheld by the U.S. Supreme Court.

form-based code: An approach to regulating development by delineating allowable building envelopes and site design. Form-based codes can incorporate regulation of allowable land uses as well.

joint development (JD): A transit-oriented development initiated by a transit agency that has some level of FTA investment in the land or infrastructure that is physically and/or functionally related to the TOC. Joint development can refer to a broader set of public-private real estate development partnerships. In this document, the term refers only to public-private partnerships involving transit agency–owned land or infrastructure.

pedestrian: Any person who travels on foot or who uses an assistive device, such as a wheelchair, for mobility.

transit-oriented community (TOC): An approach that looks beyond the individual station or TOD site to create compact, walkable and bikeable communities centered on transit. The TOC emphasis expands the goals of station area planning and individual TOD projects to include additional community benefits, including affordable housing, neighborhood-serving retail and amenities, gyms, and healthcare.

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transit-oriented development (TOD): Real estate development and neighborhoods that take advantage of transit access and support increased transit usage. TOD is often characterized by compact, mixed-use development within easy walking distance of transit (typically within one-half mile of the transit station) that accommodates safe multimodal access.

value capture: Policies and financing tools that secure increases in real estate value from development for a specific use, usually transit infrastructure or community benefits, such as affordable housing or open space. However, the meaning of value capture may be different for different agencies and for public and private sector partners.

Abbreviations and acronyms

ADA	Americans with Disabilities Act
BART	Bay Area Rapid Transit
CBO	community-based organization
CTA	Chicago Transit Authority
DOT	Department of Transportation
ENA	exclusive negotiating agreement
FTA	Federal Transit Administration
GGBHTD	Golden Gate Bridge, Highway and Transportation District
ITP	Interurban Transit Partnership
JD	joint development
METRO	Metropolitan Transit Authority of Harris County
MPO	metropolitan planning organization
NEPA	National Environmental Policy Act
NJDOT	New Jersey Department of Transportation
OEWD	Office of Economic and Workforce Development (San Francisco)
RFP	request for proposal
RFQ	request for qualification
RTA	Regional Transportation Authority (Chicago area)
RTD	Regional Transportation District (Denver)
SFMTA	San Francisco Metropolitan Transportation Agency
SPUR	San Francisco Planning and Urban Renewal
TCRP	Transit Cooperative Research Program
TIF	tax increment financing
TOC	transit-oriented community
TOD	transit-oriented development
TTC	Toronto Transit Commission
ULI	Urban Land Institute
UTA	Utah Transit Authority
WMATA	Washington Metropolitan Area Transit Authority

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Appendix A: Example of a JD program development process

WMATA has been at the forefront of advancing and implementing joint development initiatives around its bus and rail system. In 2007, it completed a comprehensive review of its JD program, leading the Board of Directors to adopt a new set of comprehensive guidelines. These guidelines were later updated in 2013, 2022 and most recently amended in February 2025. The following provides a review of WMATA's program evaluation and a summary of current JD policies.

Objectives

- Maintain or enhance transit operations, facilities and access.
- Maximize revenue from real estate holdings.
- Minimize financial risk to WMATA.
- Increase overall transit ridership.
- Increase reverse-commute ridership, including morning trips from the urban core to suburban stations and evening trips in the opposite direction.
- Encourage high-quality urban design that connects to and complements surrounding neighborhoods.
- Support and align with local jurisdictions' economic development goals.
- Where appropriate, support the establishment of employment centers consistent with TOC design principles and WMATA's operating and investment priorities.
- Implement station access improvements—including pedestrian, bicycle, bus, ADA and automobile access—based on station-specific needs identified by WMATA's station access planning program.
- Support broader transit agency goals, including affordable housing (subject to the WMATA board's adoption), sustainability and equitable development.

Standards

Station access planning should be done according to WMATA standards for replacement facilities. Conflicts between standards and project goals should be identified and solutions proposed.

Purpose

Define processes for evaluating and estimating joint development project benefits (cash value, development of new transit facilities, etc.).

Roles and responsibilities

Detailed responsibilities were outlined for the general manager and WMATA staff:

- **Local jurisdictions:** Facilitate discussion of WMATA's disclosure of economic information to local representatives.
- **Developers:** In coordination with WMATA, a selected developer will plan and construct, typically at their own expense, any and all required replacement facilities at the joint development site.
- **Community:** WMATA staff members are required to meet with local jurisdictions and potentially affected communities before soliciting development proposals (a change from being provided with a list of community organizations that could be interested in the development of the property).

Joint development procedures

Joint development objectives and procedures were significantly streamlined and clarified:

- Before soliciting price-competitive proposals, create as much developer certainty as possible via planning in conjunction with stakeholders as to land use and station access.
- Streamline the proposal process as much as possible.

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- Have flexibility to match the developer selection process to transit needs and site specifics, incorporating fiscal impacts and benefits into an overall assessment of the project's economic benefits.
- Use the station access planning process to build value into transit development projects (e.g., shared parking).
- Use all available approaches to maximize development industry interest and awareness, including use of private partners, agents and/or brokers where appropriate.
- Promote TOC practices.

Station access planning

WMATA will complete a station access planning study prior to soliciting interest. The goal is to ensure that WMATA's station access plan needs are well-understood and reflected in local sector plans. Three key components:

1. Functional needs assessment that is not design- or location-specific
2. Concept designs that identify feasible transit facility locations
3. Alignment with the WMATA Station Area Planning Guide (2017)

JD acceleration strategies (10-year strategic plan)

- **Partner with local jurisdictions:**
  - Coordinate site infrastructure needs and funding.
  - Pursue policies and funding that support housing goals.
  - Leverage local economic development strategies.
- **Right-size transit facilities:**
  - Reduce parking.
  - Modernize pick-up/drop-off zones.
  - Optimize bus infrastructure.
- **Increase development readiness:**
  - Evaluate site conditions and development feasibility.
  - Resolve entitlements and other site issues.
  - Secure gap funding commitments.
- **Minimize implementation risks:**
  - Complete compact public hearings for transit facility changes pre-RFP.
  - Simplify solicitations and proposal requirements.
  - Offer smaller parcels.

Future development station prioritization

- **Development potential:** The greater the scale of development, the greater the benefits for Metro, surrounding communities and local jurisdictions. The scale of a development is derived from the site's size and zoning. Given that the size of Metro's joint development sites are generally fixed, Metro will work with local jurisdictions to ensure allowable zoning heights, densities and land uses are supportive of TOD.
- **Infrastructure needs:** Most joint development projects require replacement of transit facilities such as bus facilities or parking, as well as other site improvements. Higher infrastructure costs can make a project economically infeasible. This plan identifies projected infrastructure replacement costs and outlines strategies and actions that Metro and jurisdictional partners can take to mitigate these costs.

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- **Market readiness:** Real estate market conditions impact whether a site will attract private investment. The strength of the real estate market depends on factors such as rents, vacancy and absorption rates, which influence a developer's ability to attain financing and support the cost of new construction. While there is little that Metro can independently do to influence market conditions, it will work with local jurisdictions to identify resources to help advance development in softer markets.

Program origins

WMATA's Joint Development Task Force issued a report in May 2007 that included 17 findings and recommendations and emphasized these themes:

- Do more pre-development planning.
- Streamline the project review process.
- Focus more on transit-oriented development and transit improvement outcomes rather than "cash."

After the publication of the report, WMATA took immediate action, discontinuing annual "mass solicitations," merging the station access planning function with the JD program, and implementing identification of station access investment needs in advance of advertisements or (in the case of an RFQ approach) in advance of negotiation of price.

The Joint Development Task Force was convened in 2006 at the behest of then-interim General Manager Dan Tangherlini to review WMATA's joint development program and to recommend improvements. The 21-member task force represented diverse community perspectives, including developers, civic activists, regional planners, WMATA compact members, regional businesspeople, smart-growth organizations and subject area experts.

The Joint Development Task Force found the failures of WMATA's program evident in both policy and process, concluding that joint development projects were too expensive, time-consuming and cumbersome, resulting in lackluster developer interest and inability to meet the potential of the station asset and market timing. WMATA also was faulted for inconsistency and confusion, especially with respect to the goals of the local community. Failure to coordinate effectively with station-area communities also negatively impacted fulfillment of station access needs.

The task force revealed internal conflicts within WMATA over defining development goals and delegating authority, which created chronic delays and a frustrated staff. Ultimately, the task force found that WMATA needed to place individual joint development projects in the context of a cohesive plan for the region. By reconciling its role as a property owner, regional transit provider and intermediary in the planning process, WMATA could then make the best use of the development potential of the Metrorail station areas.

After reviewing the task force report, WMATA revised the joint development guidelines and made three broad recommendations to address the most pressing problems:

1. Amplify the requirement for Metro staff members to consult with local jurisdiction partners and affected communities.
2. Establish an expectation that Metro staff will advocate for development conditions supportive of transit-oriented development and transit station investment.
3. Acknowledge that the balancing of advocacy and consultative roles is a general manager's responsibility.

Since then, WMATA has developed the JD program by collaborating with developers to build housing, office, retail and other amenities on WMATA property, typically through ground lease. These development

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projects maximize its TOD program by directly linking transit customers to destinations and services throughout the greater Washington area.

This process was created through the development of three key JD documents:

- Joint Development Program Guidelines (2025)
- 10-Year Strategic Plan for Joint Development (2022)
- Joint Development Policies (2022)

Further assessment

- Assess whether current zoning/jurisdictional plan aligns with station access plan. Assess market readiness.
- Establish detailed processes for conducting solicitations (include RFP and RFQ). Tailor evaluation criteria and selection procedures to each procurement approach.
- Replaced policy that "parking displaced by a joint development will be replaced on a one-for-one basis at the developer's cost" with the following:

  WMATA will work with local jurisdiction to determine the appropriate transit access facility replacement for each joint development project at a Metrorail station. Cost/benefit analysis will be conducted for alternative scenarios and shared with the community as well. This includes access via bicycle, bus and pedestrian (ADA). Demonstrate that replacement facilities accommodate at least as many patrons as original facilities.

- Establish policy for the sale of WMATA property to public agencies.
- WMATA staff will participate cooperatively in local planning processes to advocate for TOC (with meaningful opportunities for WMATA staff input).
- The chief of staff (or the person occupying any successor position) is responsible for resolving conflicts in evaluating plans for joint development.

WMATA's case can serve as a lesson to other transit agencies. It recognized major criticisms that surfaced in the community and moved swiftly to address them after the publication of the task force report. The need for greater commitment to improving joint development opportunities in the region as a whole, and the importance of cooperating with local jurisdictions and the affected communities, are issues that all transit agencies should consider in their approaches to JD in order to maximize the investment in TOD.

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Appendix B: Examples of effective partnerships

The following examples describe both formal and informal partnerships between transit agencies and local jurisdictions that have positively influenced planning and design solutions undertaken within their area of influence. These examples are not prescriptive for direct application by other agencies, but they offer potential approaches and outcomes for consideration. Transit agencies must tailor their approaches to their local conditions.

Local partnerships

Local jurisdictions largely exercise control over the type and intensity of development that occurs within their boundaries. This occurs directly through land use controls and indirectly through public infrastructure investments. Transit providers are substantially dependent upon these local jurisdictions for approval of transit service and facility improvements inside their boundaries. This section identifies a variety of tools and techniques that transit agencies have used to encourage and/or leverage partnerships with the jurisdictions through which they operate.

Minneapolis–St. Paul

Metro Transit has focused on building effective communication networks with local governments to enhance transit service at both the corridor and the project level. The transit agency's unusual position within the regional planning agency (Metropolitan Council) reinforces the local community connection, as the council has review authority over local planning activities to ensure consistency with the regional plan. The council reviews all environmental assessment worksheets, rezoning requests and amendments to the Comprehensive Plan related to new developments. Planning staff review ensures compliance with regional policy, while transit staff review provides project evaluation with respect to transit. This early involvement facilitates project changes before major investments are made in project development.

Metro Transit worked closely with the City of Minneapolis to plan transit service for the Midtown Exchange Project. This adaptive reuse of a former Sears store includes rental apartments, condominiums and townhomes; the headquarters of Allina Health hospitals and clinics; a Hennepin County Service Center; a new Sheraton Hotel; and the Midtown Global Market. A new transit center was incorporated into the development that consolidates five bus stops and makes transfers between the two bus routes more convenient. Transfers between routes are also safer, because waiting customers are more protected from the possibility of street crime. The facility provides adequate space for buses and frees up space at the intersection for turn lanes and additional street parking. The development also provides access to many potential new customers, and ridership on the two routes serving the development is expected to increase.

Salt Lake City

The Utah Transit Authority is undertaking an aggressive fixed-guideway program crossing multiple local jurisdictions. Because UTA lacks any eminent domain powers, the agency is reliant upon local government for acquisition of any property through condemnation. This situation has required extraordinary coordination and cooperation between UTA and local jurisdictions in order to advance fixed-guideway implementation throughout the region.

In order to accomplish this relationship, UTA entered into a single, multiparty, inter-local agreement that has every one of the 45 local governments in the UTA service area as signatories. This master inter-local agreement spells out UTA's aims for improved transit service and identifies UTA commitments to work closely with local leaders on plans for rail transit. The agreement outlines how UTA will involve local governments in resolving issues such as noise mitigation, utility relocations and right-of-way takes. In the agreement, UTA also commits to produce a written environmental assessment document for public review on

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each individual project (even on projects using no federal money and although Utah does not have a "Little NEPA" statute).

This master inter-local agreement also provides corresponding commitments from the local governments to work in good faith with UTA to expedite permitting reviews and approvals, etc. The fact that every local jurisdiction, from Salt Lake City down to the smallest town, has signed the same document reassures everyone that UTA will treat them fairly and not play favorites.

UTA has entered numerous special study agreements with individual local governments to conduct studies of interest to both parties, with UTA funding some share of the study costs. Sometimes those studies are led by UTA staff, and sometimes by the local government staff, depending upon the subject matter and availability of staff expertise. Frequently, the MPO and Utah Department of Transportation have also been a party to those agreements. Examples include:

- studies of how best to optimize traffic signals in downtown Salt Lake City to provide for both street-running light rail transit and good vehicular and pedestrian traffic flows;
- studies in several cities about how to modify the zoning code to provide for more transit orientation in new development projects;
- studies to produce new long-range transportation plans for some rapidly growing individual cities, with plans for pedestrian, bike, transit and highway needs; and
- corridor studies to assess specific highway and transit options and to provide for future right-of-way preservation.

Vancouver, British Columbia

TransLink obtained federal grant funding for several projects that would increase transit ridership through improvements in bus transit operations and enhanced rail station connections to the surrounding communities. These federal grants required substantial funding match from the local communities. TransLink staff used the federal funds and anticipated transit improvements and associated local infrastructure investments to leverage financial and technical participation by the local jurisdictions.

The Main Street Transit and Pedestrian Priority Project included street improvements from building face to building face along a major arterial street. Transit benefited from improved bus stop amenities and reduced transit delays. The local businesses along the street experienced higher business activity, attracted by the improved sidewalks, enhanced lighting and increased transit service. The details of the projects required close coordination between TransLink and the City of Vancouver, from planning through implementation.

TransLink also worked with several jurisdictions to better integrate SkyTrain rail stations with the communities they serve. At the Commercial–Broadway station, TransLink worked closely with City of Vancouver engineering staff to identify and implement roadway modifications to improve pedestrian access to the station, to enhance the connection with feeder buses, and to encourage TOD around the station.

The Surrey Station required a broader approach to enhance its connection with the community. The auto-oriented development in this suburban area severely impedes access at the station and from the surrounding area. As part of the federal grant program, the City of Surrey proposed projects that will both improve station access and enhance the station area as a downtown center, creating a "sense of place" in the sprawling area. The grant helped create an incentive for the city to propose these improvements. TransLink staff anticipate a continued, long-term working relationship with Surrey planning and engineering staff during the implementation of these projects.

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San Francisco

The San Francisco Metropolitan Transportation Agency service area is entirely developed, leaving little opportunity to attract new transit ridership through greenfield development. In order to increase the potential transit market in the area, SFMTA is encouraging redevelopment of existing parcels at increased densities following TOC patterns.

SFMTA's success with TOC has depended upon partnerships with other local, regional and state agencies, as well as the development community. These agencies include city departments of Planning, Public Works and SF Environment; the San Francisco Redevelopment Agency; the Office of Economic and Workforce Development; the Port of San Francisco; and the San Francisco County Transportation Authority.

At the regional and state levels, SFMTA works with the Metropolitan Transportation Commission and regional bodies concerned with air quality management, local Bay Area governments, CalTrain, the San Francisco Bay Area Rapid Transit District and other transportation agencies serving the Bay Area. Much of the coordination and collaboration activity relates to achieving the environmental goals, regional mode split targets and infill housing allocations.

Proposition G, passed by the voters of San Francisco in June 2008, establishes an agreement between the city and a private developer to revitalize Candlestick Point and Hunters Point Shipyard (a former naval base) through a mixed-use development project. The project is being managed by the San Francisco Office of Economic and Workforce Development (OEWD) and includes approximately 10,500 dwelling units, 700,000 square feet of retail, and more than 2 million square feet of office and industrial use.

In response to regional sustainability goals, the city, SFMTA and the developer propose to double the transit mode split for the new project over existing transit usage levels. To achieve this, land use patterns are being developed that encourage walking, optimize transit, and manage parking supply and vehicular traffic. The transit components are being designed based upon SFMTA service standards for route spacing, service frequency and quality of service.

The proposed transit investments and walking/bicycling targets are vetted by SFMTA for practicality and reinforced by an aggressive management parking policy supported by the developer. Key to the successful operation of the new transit services to support the development are agreements by the developer to pay a share of SFMTA's operating and capital costs. Implementation of the transportation components of the plan will be driven by financial negotiations identified in Proposition G and by environmental mitigation requirements and policy agreements brokered by public and elected officials. SFMTA's past working relationships with the San Francisco Redevelopment Agency and the OEWD have been critical in moving these negotiations toward the completion of environmental review documents in full compliance with California's rigorous Environmental Quality Act, a necessary precursor to full development entitlements.

The OEWD is pursuing a similar planning approach with SFMTA at several other similar large-scale redevelopment projects with willing development partners, such as Treasure Island (another former naval base) and Parkmerced.

State and regional partnerships

Next to local governments, the agencies with the best opportunity to influence urban design within an urban region are probably the MPO, the state DOT, and those federal and state resource agencies issuing permits related to land, air, water and other environmental resources.

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The following are some examples of partnerships and processes that transit agencies have entered into with these other important agencies—partnerships that have positively influenced regional patterns of urban form and conditions and requirements affecting the urban design details for specific projects.

Portland

There was no reason to believe that the Portland, Oregon, metropolitan area would become an outstanding example of partnerships among the transit agency, MPO, state DOT and resource agencies, as well as among local governments. In fact, two factors would seem to work against such partnerships:

- The transit agency, TriMet, has its board members appointed by the governor, not by local elected officials. Further, funding for TriMet comes from a payroll tax paid by businesses, so the appointed board members are all non-elected businesspeople.
- The regional planning agency, Metro, has board members who are directly elected from geographic districts within the three Portland counties, and thus are also not appointed by local elected officials.

Regular, frequent—sometimes weekly—meetings are held by key top staff from the state DOT, Metro, TriMet, the mayor's offices of the largest cities in each county, and the top planning and public works officials in each county. By agreement, these key staff keep one another informed of existing and pending issues related to planning, funding, design and implementation of all major transportation projects, including how federal funds should be sought and used and which state legislative issues should be pursued. These key staff members also keep their elected or appointed policy boards informed. The Joint Policy Advisory Committee on Transportation, composed of transportation representatives from across the region, formally functions as the MPO policy body for Metro, facilitating endorsement of its actions by the elected Metro board.

The result is an exceptionally strong relationship among all levels of government on transportation, land use, urban design and environmental resource decisions. It has also enabled real shared work programs among the agencies.

New Jersey

NJ Transit is a state-owned and statewide transit agency, separate from the New Jersey Department of Transportation (NJDOT). Since the early 1990s, NJ Transit has been a leader in promoting TOD. NJ Transit's 1994 publication, "Planning for Transit-Friendly Land Use: A Handbook for New Jersey Communities," was developed as a resource for planning for TOD. In 2022 a successor document, "Transit Friendly Planning: A Guide for New Jersey Communities," was published to provide updated concepts and tools.

By partnering with its sister agency NJDOT, NJ Transit has been able to accomplish a great deal more in achieving transit-friendly land use and urban design improvements. In 1999, NJ Transit and NJDOT partnered in creating the Transit Village program. Since then a total of 37 municipalities have become designated Transit Villages, and more are seeking to gain this designation. In order to do this, municipalities must demonstrate a commitment to revitalizing and redeveloping the area around transit stations into a compact, mixed-use neighborhood with a strong residential component. Once designated, those localities benefit from technical support and priority funding from state agencies, and the ability to apply for grants from a fund set aside by NJDOT. These efforts have resulted in some dramatic neighborhood revitalization in such cities as Rahway, Jersey City, Cranford and New Brunswick.

Other organizations

Transit agencies provide services that are important to many quasi-public and private sector groups, including universities and colleges, hospitals and medical centers, concentrated business and employment centers in downtown areas or other locations, homebuilders, condo and shopping center developers, and some other

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special groups. These institutions or associations are therefore potentially important partners for transit agencies seeking to achieve greater ridership or other aims that are important to both parties, including improvements in urban design of new developments.

The following are some examples of formal and informal partnerships entered into by transit agencies that have positively influenced planning and design solutions undertaken by such groups.

Downtown associations

Denver

The Downtown Denver Partnership (and its forerunner downtown association, led by a visionary leader, Phil Milstein) has long played a key role in the development of improved transit to and within the downtown area of Denver, going back to the days when the private corporation Denver Tramways operated bus services in Denver. After the multicounty Regional Transportation District was created and funding was approved by the voters, RTD worked closely with the Downtown Denver Partnership in the planning, funding and development of the 16th Street Mall, including working with businesses located on the mall and gaining support for the streetscape and urban design features that have made that facility such a success for both RTD and downtown Denver.

More recently, the partnership worked with both RTD and the City of Denver in plans for the restoration and reuse of the historic Denver Union Station as a downtown terminal for two new light-rail lines, two new commuter rail lines and some key bus routes into downtown.

Hospitals and medical centers

Houston

The Houston Medical Center, three miles south of downtown, includes several private and public teaching hospitals, medical schools, nursing schools, dental and veterinary medical facilities, and other medical offices and facilities. It is a major employment center and attracts many daily outpatient and patient visitor trips. It is located near a historic part of Houston known for its fine trees, landscaping and urban design features, and it is close to Rice University and a major city park. When Houston Metro was planning for a new light rail line from downtown Houston to the Medical Center, it entered into agreements with the Medical Center and the City of Houston to preserve and enhance key urban design features.

Private nonprofit groups and corporations

San Francisco

San Francisco Planning and Urban Renewal (SPUR), a private, nonprofit organization based in San Francisco, is dedicated to improving planning and urban design in San Francisco by harnessing the volunteer efforts of planners, architects, engineers and other interested residents to review public project proposals. For more than 40 years, SPUR has worked closely with—and provided constructive criticism to—the city-owned transit agency (Muni), the regional rapid transit agency (BART), the East Bay bus operator (AC Transit) and the agencies providing commuter rail service from the south (CalTrain), and bus and ferry service from Marin County (GGBHTD), to improve transit designs, to gain the support of the business community and to lobby San Francisco officials for improved urban design. SPUR has positively influenced the original BART station designs and the Muni Metro Market Street plans; the plans for reconstruction of the TransBay (bus) Terminal; plans for a new CalTrain terminal; and plans for light rail extensions, among other actions.

Salt Lake City

Envision Utah is a private foundation created by leaders from the government and business community to address long-range planning issues of importance to the rapidly growing Wasatch Front region, to create a

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unified vision among residents on how growth should be managed, and to strengthen community livability. Early on, UTA reached out to Envision Utah to offer support and help in dealing with issues of transportation and urban design. Together, UTA and Envision Utah funded public "visioning" workshops to bring leaders and individual residents together for one or two days of intensive exercises and discussions about what they did and didn't like in current growth patterns, and what they would like to see happen to make it better.

As a result of those workshops, Envision Utah funded studies by Calthorpe Associates on how improved and transit-oriented urban design could be put into place in several growing cities in the region. Those studies were closely watched by other nearby communities as well. Envision Utah also funded studies on the costs of sprawl and the benefits of increased transit investments, and UTA provided some technical assistance in those efforts. UTA followed up with financial assistance to some other key cities, enabling those cities to hire consultant teams to develop new transportation plans, urban design plans and zoning ordinances that implement the kind of transit-oriented design proposed by the Calthorpe studies.

Toronto, Ontario

The Toronto Transit Commission, in partnership with Distress Centers of Toronto and Bell Canada, partnered in 2011 on an initiative to help prevent subway suicides and offer hope to those at risk of suicide on Toronto's subway system. Called "Crisis Link," the program includes posters on subway platforms asking, "Thinking of Suicide? There is help. Let's talk." The posters encourage those contemplating suicide to use the pay phone at the Designated Waiting Area located on every subway platform, and the new direct-dial button that connects callers with a trained counselor at the Distress Centers of Toronto. The phone call is free and confidential. Counselors will talk with the caller and assess the risk that the individual is considering suicide. Distress Centers staff work as a team and will contact the TTC's Transit Control Centre to implement the appropriate measures to ensure that the individual remains safe.

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