SANDAG

Sustainable Communities Working Group Agenda

Thursday, June 20, 2024
1:30 p.m.

Welcome to SANDAG. The Sustainable Communities Working Group (SCWG) meeting scheduled for Thursday, June 20, 2024, will be held in person in the SANDAG Board Room. While SCWG members will attend in person, members of the public will have the option of participating either in person or virtually.

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Webinar ID: 882 0571 0057

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Free Language Assistance | Ayuda gratuita con el idioma | Libreng Tulong sa Wika | Hỗ trợ ngôn ngữ miễn phí | 免费语言协助 | 免費語言協助 | مساعدة لغوية مجانية | 무료 언어 지원 | رایگان زبان کمک | 無料の言語支援 | Бесплатная языковая помощь | Assistência linguística gratuita | मुफ़्त भाषा सहायता | Assistance linguistique gratuite | ជំនួយភាសាឥតគិតថ្លៃ | ఉచిత భాషా సహాయము | ການຊ່ວຍເຫຼືອດ້ານພາສາຟຣີ | Kaalmada Luqadda ee Bilaashka ah | Безкоштовна мовна допомога | sandag.org/LanguageAssistance | (619) 699-1900

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Vision Statement: *Pursuing a brighter future for all*

Mission Statement: *We are the regional agency that connects people, places, and innovative ideas by implementing solutions with our unique and diverse communities.*

Our Commitment to Equity: *We hold ourselves accountable to the communities we serve. We acknowledge we have much to learn and much to change; and we firmly uphold equity and inclusion for every person in the San Diego region. This includes historically underserved, systemically marginalized groups impacted by actions and inactions at all levels of our government and society.*

We have an obligation to eliminate disparities and ensure that safe, healthy, accessible, and inclusive opportunities are available to everyone. The SANDAG equity action plan will inform how we plan, prioritize, fund, and build projects and programs; frame how we work with our communities; define how we recruit and develop our employees; guide our efforts to conduct unbiased research and interpret data; and set expectations for companies and stakeholders that work with us.

We are committed to creating a San Diego region where every person who visits, works, and lives can thrive.

Sustainable Communities Working Group
Thursday, June 20, 2024

Comments and Communications

1. **Non-Agenda Public Comments/Member Comments**

Members of the public shall have the opportunity to address the Sustainable Communities Working Group (SCWG) on any issue within the jurisdiction of SCWG that is not on this agenda. Public speakers are limited to three minutes or less per person. Public comments under this agenda item will be limited to five public speakers. If the number of public comments under this agenda item exceeds five, additional public comments will be taken at the end of the agenda. SCWG members and SANDAG staff also may present brief updates and announcements under this agenda item.

Consent

+2. **Approval of Meeting Minutes**   Approve
Tessa Lero, SANDAG

The SCWG is asked to review and approve the minutes from its April 18, 2024, meeting.
Meeting Minutes

Reports

+3. **Smart Growth Incentive Program: Cycle 6 Call for Projects**   Discussion
Susan Huntington, Jenny Russo, Goldy Herbon, Lizzy Havey, Stacey Cooper, SANDAG

Staff will present an overview of the Smart Growth Incentive Program and request feedback on evaluation criteria and other items for use in the Cycle 6 Call for Projects.
Smart Growth Incentive Program
Att. 1 - Draft Evaluation Criteria
Supporting Materials

+4. **Regional Housing Needs Allocation Overview**   Information
Tuere Fa'aola, Thomas DeFranco, SANDAG

Staff will present a high-level overview of Housing and Community Development's Report *California's Housing Future 2040: The Next Regional Housing Needs Assessment.*
Regional Housing Needs Allocation Overview
Att. 1 - Additional Considerations for HCD's The Next RHNA Report
Supporting Materials

+5. **Housing Acceleration Program and Regional Early Action Planning Grants** Information
   Updates
   Tuere Fa'aola, Thomas DeFranco, SANDAG

   Staff will present an update on the Housing Acceleration Program funded though
   the state's Regional Early Action Planning grants of 2019 and Regional Early
   Action Planning grants of 2021.
   Housing Acceleration Program Update
   Att. 1 - HAP Activities Funded REAP 1.0
   Supporting Materials

6. **Adjournment**
   The next SCWG meeting is scheduled for Thursday, September 19, 2024,
   at 1:30 p.m.

+ next to an agenda item indicates an attachment

Sustainable Communities Working Group

June 20, 2024

April 18, 2024, Meeting Minutes

[View Meeting Video](#)

Councilmember Joy Lyndes (Encinitas) called the meeting of the Sustainable Communities Working Group (SCWG) to order at 1:33 p.m.

1. Public Comment/Communications/ Member Comments

Staff Comments: Regional Planner Chesley DeLeon and Senior Regional Planner Sara Toma.

Member Comments: None.

Public Comments: The OriginalDra.

<div align="center">Consent</div>

2. Approval of Meeting Minutes

The SCWG was asked to approve the minutes from its February 5, 2024, meeting.

3. Revised SCWG 2024 Meeting Calendar

The Sustainable Communities Working Group is asked to approve the proposed meeting dates for 2024.

Public Comments: The OriginalDra.

Action: Upon a motion by Todd Philips (City of Chula Vista), and a second by Jesse Brown (City of Coronado), the SCWG voted to approve the Consent Agenda.

The motion passed.

Yes: Robb Efird (City of Carlsbad), Todd Philips, Jesse Brown, Julie Marlett (County of San Diego),Patty Anders (City of Encinitas), Oscar Romero (City of Escondido), Meagan Openshaw (City of Imperial Beach), Lynnette Santos (City of La Mesa), Carlos Aguirre (City of National City), Seth Litchney (City of San Diego), Saima Qureshy (City of San Marcos), and Joseph Lim (City of Solana Beach)..

No: None.

Abstain: None.

Absent: City of Del Mar, City of El Cajon, City of Lemon Grove, City of Oceanside, City of Poway, City of Santee, and City of Vista.

<div align="center">Reports</div>

4. 2025 Regional Plan: Draft Sustainable Communities Strategy Land Use Scenarios

Sara Toma and Regional Planner Carrie Simmons presented an overview of the 2025 Regional Plan: Draft Sustainable Communities Strategy Land Use Scenarios.

Public Comments: The OriginalDra.

Action: Discussion.

5. Value Capture in the San Diego Region

Regional Planner Tim Garrett presented an overview of the Regional Value Capture Study.

Public Comments: The OriginalDra.

Action: Information.

6. 25 Years of Conservation Planning: Successes, Challenges and What's Next?

Senior Regional Planner Kim Smith and Johno Nile, Vice President of Science and Conservation at the San Diego Natural History Museum presented an overview of regional conservation planning efforts, the region's successes, emerging challenges, and next steps in implementation.

Public Comments: The OriginalDra.

Action: Information.

7. Adjournment

The next meeting of the SCWG is scheduled for Thursday, June 20, 2024, at 1:30 p.m.

Chair Lyndes adjourned the meeting at 3:04 p.m.

Confirmed Attendance at Sustainable Communities Working Group Meeting

Jurisdiction	Name	Attended
Chair **(non-voting)**	Joy Lyndes	Yes
City of Carlsbad	Jeff Murphy	No
	Eric Lardy	No
	Robb Efird	Yes
City of Chula Vista	Todd Philips	Yes
	Laura Black	No
	Desmond Corley	No
City of Coronado	Richard Grunrow	No
	Jesse Brown	Yes
	Jasmine Bridges	No
County of San Diego	Rami Talleh	No
	Tara Lieberman	No
	Julie Marlett	Yes
City of Del Mar	Karen Brindley	No
	Clem Brown	No
	Amanda Lee	No
City of El Cajon	Noah Alvey	No
	Mike Viglione	No
City of Encinitas	Patty Anders	Yes
	Crystal Najera	No
City of Escondido	Veronica Morones	No
	Oscar Romero	Yes
City of Imperial Beach	Meagan Openshaw	Yes
	Reyna Ayala	No
	Ryan Pua	No
City of La Mesa	Lynnette Santos	Yes
	Vacant	N/A
City of Lemon Grove	Michael Fellows	No
	Vacant	N/A
City of National City	Angelita Palma	No
	Carlos Aguirre	Yes

Jurisdiction	Name	Attended
	Martin Reader	No
City of Oceanside	Sergio Madera	No
	Darlene Nicandro	No
City of Poway	Robert (Bob) Manis	No
	Stann Donn	No
City of San Diego	Heidi Vonblum	No
	Alyssa Muto	No
	Seth Litchney	Yes
	Coby Tomlin	No
City of San Marcos	Saima Qureshy	Yes
	Joe Farace	No
	Scott Nightingale	No
City of Santee	Michael Coyne	No
	Sandi Hazelwood	No
City of Solana Beach	Joseph Lim	Yes
	Corey Andrews	No
City of Vista	Patsy Chow	No
	Michael Ressler	No
	Joseph Vacca	No
Advisory Members	**Name**	
Air Pollution Control District	Mike Watt	No
	Kathy Keehan	No
	Eric Luther	No
Caltrans	Reece Allen	Yes
	Maurice Eaton	No
San Diego County Local Agency Formation Commission	Keene Simonds	No
	Priscilla Mumpower	No
North County Transit District	Lillian Doherty	No
	Katie Persons	No
Metropolitan Transit System	Denis Desmond	No
	Beverly Neff	No
San Diego County Regional Airport Authority	Sydney Noyce	No
	Ralph Redman	Yes

Jurisdiction	Name	Attended
San Diego County Water Authority	Jeff Stephenson	No
	Tim Bombardier	No
Port of San Diego	Heather Carroll	No
	Walden Kiker	No
SoCal Tribal Chairman's Association	Vacant	N/A
	Vacant	N/A

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Sustainable Communities Working Group

Item: **3**

June 20, 2024

Smart Growth Incentive Program: Cycle 6 Call for Projects

Overview

The TransNet Extension Ordinance provides funding for several competitive grant programs that help implement the SANDAG Regional Plan, including the Smart Growth Incentive Program (SGIP). The SGIP provides funding to the region's 18 cities and the County of San Diego for transportation-related infrastructure and planning projects that catalyze compact, mixed-use development focused near public transit, jobs, services, and public facilities to maximize the use of existing infrastructure, preserve open space and natural resources, and increase housing and transportation choices around the region. Since 2009, the SGIP has invested approximately $60 million dollars in planning and capital projects throughout our region.

> **Action: Discussion**
> Staff will present an overview of the Smart Growth Incentive Program and request feedback on evaluation criteria and other items for use in the Cycle 6 Call for Projects.

> **Fiscal Impact:**
> Up to $35 million dollars could be made available through the Cycle 6 call for projects through OWP No. 3300100: TransNet Smart Growth & Active Transportation Grant Programs.
>
> **Schedule/Scope Impact:**
> Pending Board approval, staff anticipates releasing the Smart Growth Incentive Program Cycle 6 Call for Projects in November 2024.

Key Considerations

Similar to previous funding cycles, staff proposes two categories of funding for planning and capital projects. Additionally, a mitigation measure in the 2021 Regional Plan Environmental Impact Report includes providing grants to jurisdictions to prepare or make updates to their climate action plans. Therefore, a third category for climate action plans will also be included. The majority of funds would be made available in the capital category of funding.

With the adoption of the 2021 Regional Plan and Sustainable Communities Strategy, SANDAG embraced mobility hub areas, now Transportation Investment Areas, as the land use strategy to concentrate housing and job growth in the region. In this upcoming cycle of funding, Smart Growth Opportunity Areas will be removed and staff is proposing no geographic boundaries to be eligible for funds. . Funding will be prioritized for projects that best align with the 2021 Regional Plan and its mitigation measures.

Staff will present the draft evaluation criteria (Attachment 1) for discussion with SANDAG Working Groups and Policy Advisory Committees for input. Feedback received will be used in the development of the final call for projects.

Next Steps

Based on feedback received, Staff will update the evaluation criteria, and bring the final call for projects to the TransNet Independent Taxpayer Oversight, Regional Planning, and Transportation Committees for recommendation of approval by the SANDAG Board of Directors in November 2024.

Susan Huntington, Director of Financial Planning, Budgets, and Grants

Attachment: 1.   Draft Evaluation Criteria

**Smart Growth Incentive Program (SGIP) Cycle 6 Call for Projects
Draft Evaluation Criteria**

CAPITAL PROJECTS

No.	CRITERIA	POINTS POSSIBLE
1.	RELATIONSHIP TO REGIONAL TRANSIT	10
	The project is located within a Mobility Hub or Transit Priority Area	
2.	FURTHERS REGIONAL PLAN AND SUSTAINABLE COMMUNITIES IMPLEMENTATION STRATEGIES	15
A.	The degree to which the project furthers the Sustainable Communities Strategy	5
B.	The degree to which the project furthers Vision Zero policies and goals	5
C.	The degree to which the project furthers equity and benefits disadvantaged communities	5
3.	SMART GROWTH POLICY IMPLEMENTATION	15
	Land Use, Urban Design, Mobility, Sustainability, Resilience (3 points each)	
4.	PROJECT FEASIBILITY	30
A.	Project development milestones that are completed on or before the Application Deadline. • Neighborhood level plan, corridor study, or community active transportation strategy. (1 point) • Environmental clearance (CEQA) or evidence that environmental clearance is not required. (2 points) • Completed right-of-way acquisition and all necessary entitlements or evidence that right-of-way acquisition is not required. (3 points) • Progress toward the project being ready to bid for construction. (4 points)	10
B.	The degree to which the project will efficiently use program funds, as demonstrated by the proposed project scope, schedule, and budget.	15
C.	The degree to which community members have been engaged and outreach is incorporated throughout the project.	5
5.	BOARD POLICY No. 033	25
A.	ProHousing Policies (Favorable Zoning and Land Use, Acceleration of Housing Production Timeframes, Reduction of Construction and Development Costs, Providing Financial Subsidies)	12.5
B.	Housing Equity/Affirmatively Furthering Fair Housing	12.5
6.	MATCHING FUNDS	5
	Points will be awarded based on a scale. The matching fund percentage is derived by comparing the total matching funds relative to the total project cost.	
	TOTAL	**100**

PLANNING PROJECTS

No.	CRITERIA	POINTS POSSIBLE
1.	RELATIONSHIP TO REGIONAL TRANSIT	10
	The project is located within a Mobility Hub or Transit Priority Area	
2.	FURTHERS REGIONAL PLAN POLICIES AND IMPLEMENTATION STRATEGIES	20
A.	The degree to which the project furthers Mobility Hub implementation	5
B.	The degree to which the project furthers the Sustainable Communities Strategy	5
C.	The degree to which the project furthers Vision Zero policies and goals	5
D.	The degree to which the project furthers equity and benefits disadvantaged communities	5
3.	SMART GROWTH POLICY IMPLEMENTATION	15
	Land Use, Urban Design, Mobility, Sustainability, Resilience (3 points each)	
4.	PROJECT FEASIBILITY	25
A.	The degree to which the project will efficiently use program funds, as demonstrated by the proposed project scope, schedule, and budget.	15
B.	The degree to which community members have been engaged and outreach is incorporated throughout the project.	10
5.	BOARD POLICY No. 033	25
A.	ProHousing Policies (Favorable Zoning and Land Use, Acceleration of Housing Production Timeframes, Reduction of Construction and Development Costs, Providing Financial Subsidies)	12.5
B.	Housing Equity/Affirmatively Furthering Fair Housing	12.5
6.	MATCHING FUNDS	5
	Points will be awarded based on a scale. The matching fund percentage is derived by comparing the total matching funds relative to the total project cost.	
	TOTAL	100

CLIMATE ACTION PLANS

No.	CRITERIA	POINTS POSSIBLE
1.	CLIMATE ACTION PLAN CONTENTS	20
A.	The project includes a greenhouse gas (GHG) emissions inventory for an appropriate recent baseline year, in accordance with adopted protocols, and includes GHG emissions forecasts and reduction targets for 2035 and 2050.	10
B.	The degree to which the project will include specific, quantifiable GHG reduction measures that will achieve the GHG reduction targets.	10
2.	IMPLEMENTATION AND MONITORING	25
A.	Program for implementing each GHG emissions reduction measure, including but not limited to identification of responsible parties, key actions, timeline, costs, and funding sources.	12.5
B.	Inclusion of a program for monitoring progress toward achievement of the GHG emissions reduction target(s), including but not limited to metrics for tracking progress, periodic updates to the GHG emissions inventory, regular reporting of progress, and timing of future CAP updates.	12.5
3.	PROJECT FEASIBILITY	25
A.	The degree to which the project will efficiently use program funds, as demonstrated by the proposed project scope, schedule, and budget.	15
B.	The degree to which community engagement will be incorporated into the development, implementation, and/or monitoring of the CAP.	10
4.	BOARD POLICY No. 033	25
A.	ProHousing Policies (Favorable Zoning and Land Use, Acceleration of Housing Production Timeframes, Reduction of Construction and Development Costs, Providing Financial Subsidies)	12.5
B.	Housing Equity/Affirmatively Furthering Fair Housing	12.5
5.	MATCHING FUNDS	5
	Points will be awarded based on a scale. The matching fund percentage is derived by comparing the total matching funds relative to the total project cost.	
	TOTAL	100

Smart Growth Incentive Program (SGIP) Cycle 6 Call for Projects

Evaluation Criteria Discussion

Sustainable Communities Working Group | Item 3
Jenny Russo and Stacey Cooper
June 20, 2024

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Agenda

- Program Overview
- SGIP Cycle 6 Updates
- Evaluation Criteria
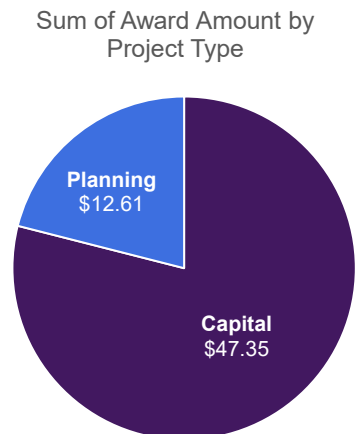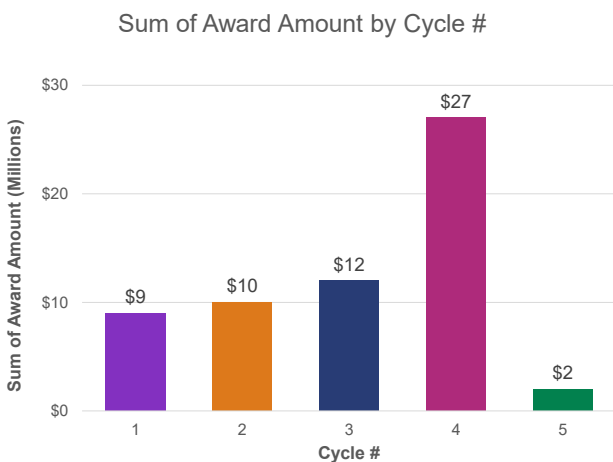- Discussion

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SGIP Overview

- Competitive grant program for local jurisdictions funded by TransNet

- Funds comprehensive public infrastructure projects and planning activities

- Facilitates compact, mixed-use, transit-oriented development and increases housing and transportation choices

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SGIP Awards, Cycle 1 - 5

Sum of Award Amount by Cycle #

Sum of Award Amount by Project Type

Planning $12.61

Capital $47.35

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SGIP Projects

More than 70 planning & capital projects throughout the region

Projects include:

- Enhanced downtown streetscapes
- City plaza gathering and beautification projects
- Safer street design to include enhanced pedestrian and bike infrastructure
- Climate Action Plans, TOD Studies and Specific Plans, etc.

Third Avenue Streetscape Implementation

Armorlite Complete Street Corridor

Lemon Grove Trolley Plaza
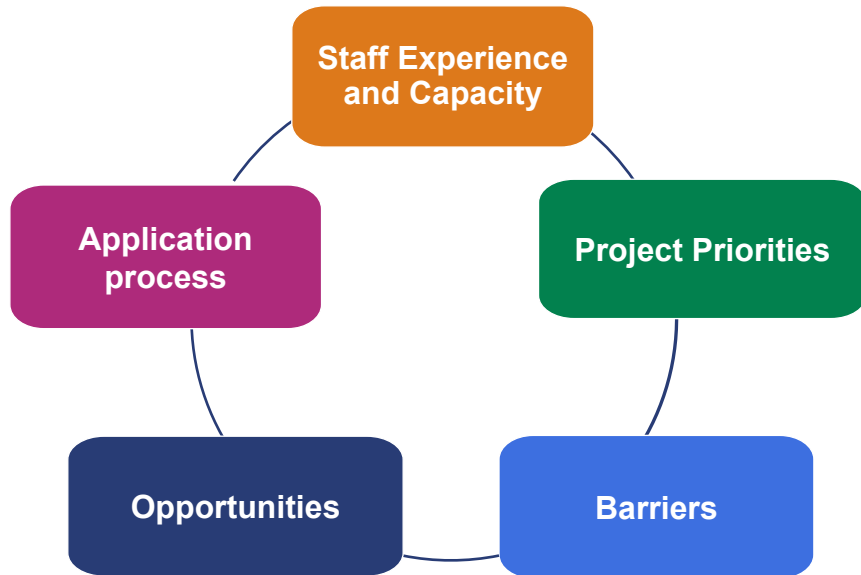

Downtown Wayfinding Signage

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SGIP Cycle 6 Updates

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Local Staff Considerations

Feedback from the November 2023 Kickoff Event with staff from local jurisdictions.

- Staff Experience and Capacity
- Project Priorities
- Barriers
- Opportunities
- Application process

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Program Description

SGIP, funded through TransNet, provides funding for transportation-related infrastructure improvements and planning efforts that facilitate compact, mixed-use, transit-oriented development and increase housing and transportation choices.

New! Proposing no geographic constraints, but projects must:

- Advance multimodal transportation
- Better integrate transportation and land use
- Demonstrate meaningful reductions to vehicle miles traveled (VMT) and greenhouse gas (GHG) emissions
- Advance equity
- Align with the 2021 Regional Plan and Sustainable Communities Strategy

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Grant Categories
Three categories will be made available

| SGIP Cycle 6 Call for Projects	Climate Action Planning	Planning	Capital
Description	To prepare or update CAPs and GHG reduction plans that keep pace with state targets and goals for GHG emission reductions	Includes plans and processes that accelerate smart growth activities but will not directly result in the construction of a public improvement project.	Will eventually result in the construction of public improvements. Project phases can include environmental, design (conceptual, preliminary, or final), right-of-way, and construction.
Example Projects	New or updates to existing climate action plans and GHG reduction plans	Curb management plans, specific or area plans, transit-oriented development plans, complete streets plans or policies, rezoning or zoning updates, Program-level environmental clearance, density bonus ordinance, etc.	Updating housing supportive infrastructure, bike and pedestrian infrastructure enhancements, traffic calming infrastructure such as roundabouts, streetscape or placemaking enhancements for pedestrians, projects listed in CAPs as applicable, etc.

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Cycle 6 Funding Overview

Available Funding: $35 million

Proposed Allocation

8.5% Climate Action Planning ($3 million)

20% Planning ($7 million)

71.5% Capital ($25 million)
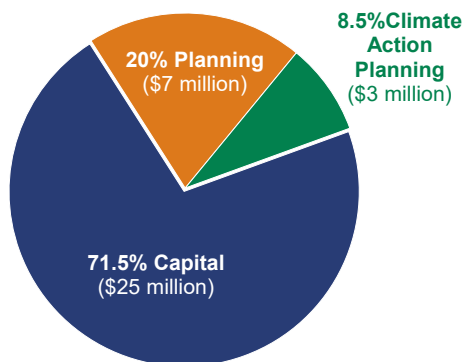
	Climate Action Planning	Planning	Capital
Minimum	$150,000	$150,000	$500,000
Maximum	$400,000	$750,000	$3,000,000
Performance Period (NTP +)	3 years (36 months)	3 years (36 months)	3.5 years (42 months)

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Anticipated Timeline

2024

November 2023
Kickoff event with jurisdiction staff

June 2024
Scoring Criteria to Mobility and Sustainable Communities Working Groups

July- November 2024
Call for Projects to ITOC, Transportation Committee, Regional Planning Committee, and Board of Directors

November 2024 - February 2025
Call for Projects Released, application period

2025

March - April 2025
Evaluation and development of funding recommendations

May- July 2025
Funding Recommendations to ITOC, Transportation Committee, Regional Planning Committee, and Board of Directors

October 2025
Grant Agreements and Notices to Proceed Issued

2028 - 2029
Projects Complete and Close Out

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Evaluation Criteria
Proposed categories of evaluation criteria for further discussion

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Draft Evaluation Criteria
Planning and Capital

Planning (DRAFT)	Percent
1. Relationship to Regional Transit	10%
2. Furthers Regional Plan and Sustainable Communities Implementation Strategies	20%
3. Smart Growth Policy Implementation	15%
4. Project Feasibility	25%
A. Efficient Use of Program Funds (15%)	
B. Community Engagement (10%)	
5. Board Policy 33	25%
6. Matching Funds	5%

Capital (DRAFT)	Percent
1. Relationship to Regional Transit	10%
2. Furthers Regional Plan and Sustainable Communities Implementation Strategies	15%
3. Smart Growth Policy Implementation	15%
4. Project Feasibility	30%
A. Major Milestones Completed (10%)	
B. Efficient Use of Program Funds (15%)	
C. Community Engagement (5%)	
5. Board Policy 33	25%
6. Matching Funds	5%

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Draft Evaluation Criteria
Climate Action Planning

New or updates to local Climate Action Plan

Climate Action Planning	Percent
1. Climate Action Plan Contents	20%
A. GHG Emissions Inventory (10%)	
B. GHG Reduction Measures (10%)	
2. Implementation and Monitoring	25%
A. Implementation Program (12.5%)	
B. Program Monitoring (12.5%)	
3. Project Feasibility	25%
A. Efficient Use of Program Funds (15%)	
B. Community Engagement (10%)	
5. Board Policy 33	25%
6. Matching Funds	5%

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Board Policy 33

Eligibility for Board Policy 33 points: Compliant housing element and submitted APR up to date.

Accounts for 25% of points

1. **Pro-housing Policies***. A local jurisdiction may earn <u>up to half</u> of the total points awarded under this Policy by demonstrating that it has implemented policies that accelerate the production of housing in the four categories listed below:
   - Favorable Zoning and Land Use.
   - Acceleration of Housing Production Timeframes
   - Reduction of Construction and Development Costs
   - Providing Financial Subsidies
2. **Housing Equity/Affirmatively Furthering Fair Housing.** A local jurisdiction may earn <u>up to half</u> of the total points awarded under this Policy by addressing housing inequity and providing solutions to foster equitable and inclusive communities.

* Jurisdictions with Pro-housing designation will be awarded full points.

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2024 TransNet Triennial Performance Audit Recommendations

Performance Measures	More Detailed Scopes of Work	Stronger Performance Monitoring and Reporting
Detailed Site Visits	Photos and Documentation	Final Project Report and Closeout

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Changes to Call for Projects Process

More Detailed Scoring Rubrics	Encourage Evaluator Consensus	Use Average Scores	Geographic Funding Distribution

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June 20, 2024

Regional Housing Needs Allocation Overview

Overview

The Regional Housing Needs Assessment (RHNA) is a statutory process to determine existing and projected housing needs for every jurisdiction within the State of California. The California Department of Housing and Community Development (HCD) provides every council of governments (COG), including SANDAG, a regional housing needs determination, and each COG is responsible for developing a methodology to distribute the housing units to individual jurisdictions. The RHNA allocation covers an 8-year period and requires each jurisdiction to plan for their allocation in their housing elements by identifying suitable sites and implementing various programs, including rezoning.

Action: **Information**
Staff will present a high-level overview of Housing and Community Development's Report *California's Housing Future 2040: The Next Regional Housing Needs Assessment.*

Fiscal Impact:
None

Schedule/Scope Impact:
None

AB 101 (2019) directed HCD to develop recommendations related to the RHNA process and methodology that promote and streamline housing development and substantially address California's housing shortage. From March to July 2023, HCD solicited ideas and feedback from stakeholders for ways to improve the RHNA methodology and process. In April 2024, they released a report on its findings and recommendations to the legislature. Throughout this process, SANDAG provided feedback to HCD through their sounding board listening sessions, hosted a webinar with local jurisdiction staff, and provided ongoing updates to local jurisdiction staff and the Board of Directors on the HCD reform process. At the July 14, 2023 Executive Committee Meeting, SANDAG staff presented an overview of the HCD stakeholder engagement process for California's Housing Future 2040: The Next Regional Housing Needs Assessment.

Key Considerations

On March 22, 2024, HCD provided an update to the SANDAG Board of Directors on their efforts to develop recommendations related to the RHNA process and methodology. At the Board meeting, the SANDAG Board of Directors provided their feedback to HCD on the RHNA process including the lack of transparency in the determination process, the lack of funding to implement RHNA, the lack of flexibility and consideration for local context, the inability to adjust allocations mid-cycle, and the loss of local control. The Board also asked questions about HCD's plan to incorporate the State's Auditor recommendations in the next RHNA cycle.

On April 18, 2024, HCD released the *California's Housing Future 2040: The Next RHNA* full report and executive summary which includes recommendations and policy considerations to the legislature and outlines planned administrative changes to be adopted under existing HCD statutory authority. HCD's Audit Action Plan can also be found on their website.

HCD's recommendations are summarized under three sections:

Recommendations to Legislature
HCD recommends 10 updates to state law including adding new income categories, streamlining the RHNA processes, ensuring that the regional allocation methods are focused on furthering statutory RHNA objectives, revising the allocation methodology to increase clarity, tying the Regional Housing Need Determination (RHND) more closely to the Department of Finance household projections, and increasing alignment between RHNA and the Sustainable Communities Strategy.

Policy Considerations for the Legislature
Three policy considerations were included that merit further exploration by the legislature. HCD does not have recommendations for these topics but presented their findings for further policy consideration.

HCD Future Implementation Efforts
Nine planned administrative changes are proposed to be adopted under existing HCD statutory authority. This includes various adjustments to the RHNA methodology, greater transparency during the RHND process, and more technical assistance and guidance from HCD. HCD staff should provide additional information and guidance regarding these planned adjustments to COG's and stakeholders leading up to the start of the 7th Cycle in 2027.

Next Steps

SANDAG staff are conducting a detailed analysis of these recommendations to understand their impacts and will bring additional information to the Regional Planning Committee in summer 2024 and the Executive Committee in fall 2024.

Tuere Fa'aola, Deputy Director of Regional Planning

Attachment: 1.   Additional Considerations for HCD's *The Next RHNA* report.

HCD Future Implementation Efforts		
Implementation Effort	**Summary**	**Considerations**
Apply Cost Burdened & Overcrowded Determination Adjustment Factors to Existing Households	HCD plans to apply the cost burden and overcrowding adjustment to the existing population, rather than the projected population	This may lower the Determination number because additional units to satisfy the overcrowded and cost burdened projected population would no longer be needed
Improve the Precision of Vacancy Rate Determination Adjustment Factor	HCD plans to alter the vacancy rate calculation to account for differences in healthy functioning housing markets for renter and owner-occupied housing	This may lead to a higher Determination number as the San Diego region has high non-owner, non-renter housing units (lots of short-term rentals and second homes)
Account for Housing Lost to Vacation Homes and Short-Term Rentals	HCD plans to alter its replacement rate adjustment in the 7th cycle to account for units that will be lost to short-term rentals and vacation homes	This may lead to a higher Determination number as the San Diego region has seen a growing number of short-term rentals and vacation homes
Refine the Jobs/Housing Determination Adjustment Factor	HCD plans to continue utilizing the two 7th cycle adjustments created in 2023, but the first adjustment will be refined to consider the income level of commuters. HCD is continuing to consider a different healthy standard than 1.5 jobs for every housing unit, primarily an option based on the national average jobs/housing ratio	HCD requested further exploration of international migration and remote work data, two factors where the San Diego region is unique and may want to consider providing HCD additional data.

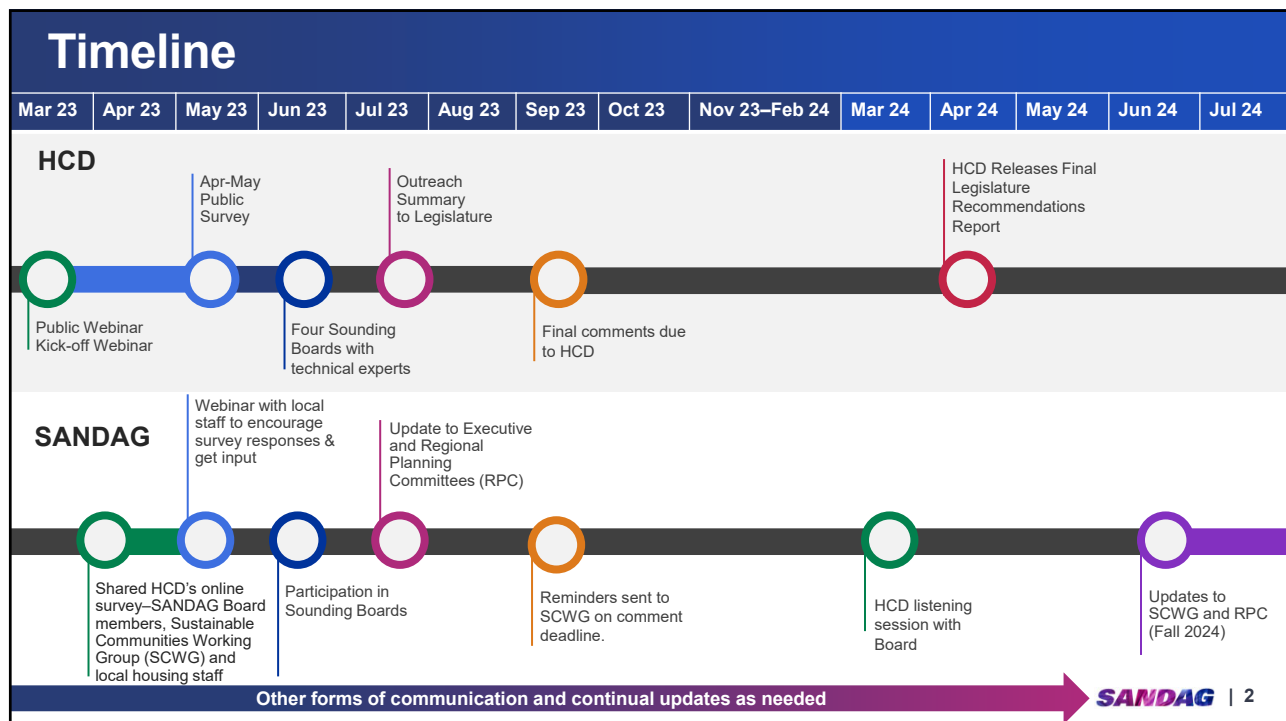| Implementation Effort	Summary	Considerations
Adjust How Populations Living in Group Quarters are Treated in Determination, Credit Wider Range of Housing Types in Annual Progress Reports (APR)	HCD plans to make changes to how populations living in group quarters are treated in the Determination, including crediting a wider range of housing types in the APR and working with DOF to ensure the RHNA fully encompasses the need for housing in California	Provides clarity to a topic that SANDAG had issue with in 6th Cycle. This may lead to higher Determination numbers, but also would allow for jurisdictions to take credit for housing permits which they currently aren't able to credit for.
Reduce Allocation to Unincorporated Areas Outside of Population Centers	HCD will pursue allocating to counties based on the percentage of the county population that resides in Census Designated Places rather than the unincorporated counties total population and number of households	This may lead to a reduction in unit allocation % to County of San Diego.
Improve Technical Assistance for the Subregion Process	HCD plans to increase technical assistance to subregions by releasing a technical assistance memo that will provide subregions more guidance/support developing a methodology that furthers RHNA objectives	This may impact if jurisdictions decide to move forward with subregional allocation process.
Increase Transparency During the Determination	HCD plans to implement procedural and informational enhancements to the current determination process including methodology walkthroughs with board, interactive tools and infographics, enhanced websites, definitions of technical terms and concepts, and publishing of technical assistance documents	This may lead to an increased opportunity for transparency as consistently requested by stakeholders.

Recommendations to the Legislature		
Implementation Effort	**Summary**	**Considerations**
Account for Housing Needs of People Experiencing Homelessness	HCD intends to change its income category definitions used in the RHNA process to align more closely with the criteria outlined in Government Code Section 65584(f)	Related to AB 3093 (Ward). New bill specifically creates two new income categories, Acutely Low Income (ALI) and Extremely Low Income (ELI), in the Regional Housing Needs Determination, Regional Housing Needs Allocation, and Housing Element Law. Bill also would require SANDAG to include homelessness data within the Determination process to determine the need of these new income categories
Further & Balance the Five Statutory Objectives of RHNA	HCD plans to release a technical assistance memo that will offer additional, up-front guidance on how to develop a methodology that furthers the statutory objectives	This may lead to an increased opportunity to for transparency as consistently requested by stakeholders

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Update on California Housing Future 2040 (RHNA Update)

Sustainable Communities Working Group| Item 4
Tuere Fa'aola, Deputy Director of Sustainable Communities
Thomas DeFranco, Regional Planner
June 20, 2024

1

Timeline

Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23–Feb 24	Mar 24	Apr 24	May 24	Jun 24	Jul 24

HCD

Apr-May Public Survey

Outreach Summary to Legislature

HCD Releases Final Legislature Recommendations Report

Public Webinar Kick-off Webinar

Four Sounding Boards with technical experts

Final comments due to HCD

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Webinar with local staff to encourage survey responses & get input

Update to Executive and Regional Planning Committees (RPC)

Shared HCD's online survey–SANDAG Board members, Sustainable Communities Working Group (SCWG) and local housing staff

Participation in Sounding Boards

Reminders sent to SCWG on comment deadline.

HCD listening session with Board

Updates to SCWG and RPC (Fall 2024)

Other forms of communication and continual updates as needed

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Board Member Feedback Summary

- Lack of transparency for RHND
- Lack of funding to implement RHNA
- Lack of flexibility and consideration for local context
- Inability to adjust allocations mid-cycle
- Loss of local control
- Incorporate State Auditor recommendations in the next cycle

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CA Housing Future 2040 Legislative Report
The Next Regional Housing Needs Allocation (RHNA)

4

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HCD Guiding Principles

- **Ensure RNHNA is a fair, transparent, objective, and streamlined process** for identifying housing need.
- **Strategically plan for the needs of households of all income levels** while promoting infill development, the protection of natural resources, and efficient development patterns.
- **Account for future climate risk** with the goal of ensuring communities and vulnerable populations are not unduly exposed to climate risks.
- **Encourage increased development** to substantially address California's housing shortage and affordability issues.
- **Improve compliance and outcomes** through incentives and enforcement.
- **Enhance and protect RHNA's role in Affirmatively Furthering Fair Housing** so that all cities plan for their fair share of growth and future planning does not future entrench segregated living patterns.

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Report to Legislature Released, April 18, 2024

California's Housing Future 2040
The Next Regional Housing Needs Allocation (RHNA)
California Department of Housing and Community Development

April 2024

- Recommendations to Legislature
- Policy Considerations to Legislature
- HCD Future Implementation Efforts

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Policy Considerations to the Legislature (3)

1. **Adjust Income Distribution to Better Address Housing Needs of All Regions**
2. Explore Assigning Units Lost During State of Emergency Declaration to Overall Allocation
3. Explore Ways to Clarify RHNA Process and Simplify Language in Statute

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Recommendations to the Legislature (10)

1. **Account for Housing Needs of People Experiencing Homelessness**
   - Adds extremely low and acutely low-income categories
2. **Tie RHND More Closely to the DOF Household Projections**
3. **Adjust How Populations Living in GQ are Treated in Determination & Credit Wider Range of Housing in APRs**
4. Replace Comparable Regions Option with Comparison to National Average
5. **Further & Balance the Five Statutory Objectives of RHNA**
   - COGs must obtain approval from HCD on methodology before adopting
6. Revise the Allocation Methodology Factors to Increase Clarity and Improve Outcomes
7. Revise the Local Data Survey Requirements
8. **Refine the Appeals Process to Increase Clarity and Efficiency**
9. Promote Equitable Public Participation During Allocation Methodology Development Process
10. **Improve RHNA & RTP/SCS Alignment**

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Account for Housing Needs of People Experiencing Homelessness

- AB 3093 (Ward)
  - Creates two new income categories, Acutely Low Income (ALI) and Extremely Low Income (ELI), in the Regional Housing Needs Determination (RHND), Regional Housing Needs Allocation (RHNA), and Housing Element Law for 7th Cycle
  - Requires regional Councils of Governments (COGs) to provide HCD with data on the housing needs of individuals and families experiencing homelessness for the purpose of determining the 7th Cycle RHND
  - Coauthored by Senator Blakespear, Sponsored by Governor Newsom
  - Current Status: In Progress – In Senate
    - Passed Assembly (Ayes 64. Noes 5. NVR 11), must pass Senate by end of August, signed by Gov end of September

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HCD Future Implementation Efforts (9)

1. **Apply Cost Burdened & Overcrowded Determination Adjustment Factors to Existing Households Rather than Projected**
2. **Improve the Precision of Vacancy Rate Determination Adjustment Factor**
3. **Refine the Jobs/Housing Determination Adjustment Factor**
4. **Account for Housing Lost to Vacation Homes and Short-Term Rentals**
5. **Increase Transparency During the Determination Process**
6. **Adjust Income Distribution to Better Address Housing Needs of All Regions**
7. **Adjust How Populations Living in Group Quarters are Treated in Determination, Credit Wider Range of Housing Types in APR**
   - Includes certain group quarters populations in the RHND
8. Reduce Allocation to Unincorporated Areas Outside of Population Centers
9. Improve Technical Assistance for the Subregion Process

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Next Steps

Staff will bring a more detailed discussion item to Regional Planning Committee in Summer 2024 followed by a discussion item to Executive Committee Fall 2024

Regular updates will be provided as more information on HCD's next steps and timelines becomes available

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Housing Acceleration Program Update

Overview

SANDAG launched its Housing Acceleration Program (HAP) with $6.8 Million in funding from the Regional Early Action Planning Grants of 2019 (REAP 1.0). With an additional $43 million in Regional Early Action Planning grants of 2021 (REAP 2.0) funding, SANDAG was planning to continue and expand the program. However, due to proposed cuts to the REAP program in the state's FY 2024-2025 draft budget, initiatives funded through REAP 2.0 are currently on hold until the budget is finalized. Staff will present an overview of SANDAG's role as it pertains to housing programs and funding throughout the region.

Key Considerations

The REAP 1.0 program focused on planning activities that assist local jurisdictions with developing and implementing 6th Cycle housing elements. As a result, the HAP was split into three main strategies, which were shaped by interviews with local jurisdictions, best-practice research, and focus groups with regional stakeholders. A summary of the three strategies and their activities are provided below and summarized in Attachment 1.

Action: **Information**

Staff will present an update on the Housing Acceleration Program funded though the state's Regional Early Action Planning grants of 2019 and Regional Early Action Planning grants of 2021.

Fiscal Impact:

The Housing Acceleration Program activities are funded in the FY 2024 budget through Overall Work Program Project Nos. 3321900 Regional Early Action Planning grants of 2019 (REAP 1.0) and 3321901 Regional Early Action Planning grants of 2021 (REAP 2.0)

Schedule/Scope Impact:

The REAP 1.0 close out report is due to California Department of Housing and Community Development by November 2024. SANDAG is waiting for the finalized FY 2024-2025 budget to determine next steps for its housing program funded through REAP 2.0.

- Local Jurisdiction Support: Offers technical resources and financial assistance to support cities and the County. SANDAG awarded $1,935,243 through HAP Cycle 1 grant program to local jurisdictions to support 7 planning projects and provides technical assistance to address the unique needs of the 18 cities and unincorporated county.

- Data Analysis and Policy Resources: Compiles data, policy tools, resources, and best practices for local jurisdictions, stakeholders and communities. The Housing Policy and Planning Tool (HPPT) is a 'one-stop' online platform on SANDAG's open data portal where housing data, resources, and policy documents are readily available to local jurisdictions and stakeholders. Many of the resources created through the technical assistance program and the deliverables from the Regional Anti-displacement Strategy are also available on the HPPT.

- Regional Initiatives: Provides education, leadership and funding opportunities to accelerate housing investments. Activities include regional convenings like the Housing Policy Leadership Academy, Housing Policy Bootcamp, and policy forums and regional studies that identify finance & revenue opportunities.

REAP 2.0 builds on the success of REAP 1.0 and expands the program focus by integrating housing and climate goals, allowing broader planning and implementation investments, including infrastructure investments.

SANDAG engaged in robust outreach during 2022 to develop program priorities. Based on input received from local jurisdictions, elected officials, under-resourced and disadvantaged communities, affordable housing developers, and tribal nations, SANDAG proposed to use the funds for local jurisdiction support including expanding the HAP grant program, an affordable housing program to develop an evergreen regional housing trust fund, transit agency partnerships to advance redevelopment at transit centers, and a tribal partnership to develop a tribal housing program.

On May 30, 2023, the California Department of Housing and Community Development (HCD) approved SANDAG's full REAP 2.0 application, formally committing $43 million to our region. Since that time, SANDAG has moved forward with its proposed uses including a suballocation of $12.3 million for 15 transformative projects to local jurisdictions through the HAP Cycle 2 grant program.

However, on January 10, 2024, Governor Gavin Newsom announced a proposed budget that would cut $1.2 billion in funding for housing programs, including $300 million reversion, or half of the state's REAP 2.0 program. Given the uncertainty of the budget, SANDAG has paused most of the initiatives that were proposed to the state for this funding.

Next Steps

SANDAG will conclude activities funded through REAP 1.0 by June 30, 2024, and continue to advocate for critical REAP 2.0 funding. When the state budget is finalized, SANDAG will determine the next steps for the HAP.

Tueré Fa'aola, Deputy Director of Regional Planning

Attachment: 1.   HAP Activities Funded REAP 1.0

SANDAG's Housing Acceleration Program (HAP)

REAP 1.0 Funded Activities	
Local Jurisdiction Support	
HAP Cycle 1 Planning Grants	Competitive call for projects for local jurisdictions. $1.9 million awarded in March 2022 for 7 planning projects that encourage sustainable and equitable housing practices, policies and process improvements that accelerate housing production, facilitate implementation of the 6th Housing Element Cycle, and affirmatively further fair housing.
Local Jurisdiction Technical Assistance Program	Developed with local jurisdiction input and includes multiple components that cater to their varying needs and capacities: • Trainings & webinars (Six completed) • Engagement, communication and collaboration • Legislative tracking and interpretation • Sub-regional meetings and focus groups (Seven held) • Templates, toolkits and memos (Twenty-two completed) • Supported thirteen member agencies with local staffing assistance for over twenty-five unique projects Some of the resources are stored in the Housing Policy Resource section of the Housing Policy and Planning Tool.
Sustainable Communities On-Call	Consultant bench across 6 disciplines – land use, housing, community development finance, equity, climate resiliency, and transportation – available to member agencies
Data and Policy Resources	
Pro-Housing Best Practices Report	Provides context for how SANDAG could remove barriers to housing development, advance equity, and improve housing finance mechanisms. *Completed September 2021*
Housing Policy & Planning Tool (HPPT)	Online housing resource hub for policymakers, jurisdiction staff, and the public. Modules: affordable housing case studies, housing policy resources, housing element compliance, APR housing data explorer, ADU report, RHNA dashboard and Anti-displacement Strategies. *Launched Fall 2023*

| REAP 1.0 Funded Activities	
Anti-Displacement Strategy	Takes a data-driven approach to tell the story of displacement in the San Diego region and is designed to assist local jurisdictions in preventing residential displacement. Includes existing conditions, best practice research and provides a toolkit with implementation actions tailored to the San Diego region. *Completed Winter 2024*
Regional Initiatives	
Housing Acceleration Program (HAP) Strategy	Outlines goals, policies, and actions to guide SANDAG's role as a housing leader and HAP initiatives. *Completed September 2022*
Housing Policy Leadership Academy (HPLA)	Provides a forum for leaders and housing professionals to explore the relationship between policy, planning, and housing development and develop equitable, inclusive policy solutions to increase housing production and affordability. 49 participants across 2 cohorts graduated in *December 2022*. Graduates included two city council members, six policy advisors, five regional planners, two planning commissioner/planning group representatives, and eight planning and housing department professionals. Approximately 40 participants from the current cohort are on track to graduate in *May 2024.*
Housing Policy Bootcamp	4-week intensive course which challenges HPLA alumni to learn the essentials of policy analysis and policy development. *To be held in May/June 2024.*
Housing Policy Forums	Housing Legislative Overview, February 2022 – 190 attendees Equitable Homeownership, August 2022 (joint with SCAG) – 263 attendees Housing Legislative Overview, November 2022 (joint with SCAG) – 279 attendees Rethinking Social Housing for California, March 2023 (joint with SCAG) – 252 attendees 2023 New State Housing Laws Overview Webinar, November 2023 (joint with ABAG) – 464 attendees Legislative Forecast & Review of the Governor's Budget February 2024 – 160 attendees
Land Value Capture Study	Evaluates a suite of land value capture mechanisms and develops a long-term strategy that can aid SANDAG and partner agencies in advancing regional housing goals and raising sustainable revenue to implement Regional Plan projects. *Completed August 2023*
Capital Mapping Study	Identifies public, private, and philanthropic funding opportunities to help meet regional housing targets and accelerate housing production. *Completed May 2022*

Update on SANDAG's Housing Acceleration Program (HAP)

Sustainable Communities Working Group | Item 5
Presented by Thomas DeFranco
June 20, 2024

1

Regional Early Action Planning Grants (REAP)

Funding allocated to SANDAG based on population

REAP 2.0
$43 million

REAP 1.0
$6.8 million

2020   2022   2024   2026
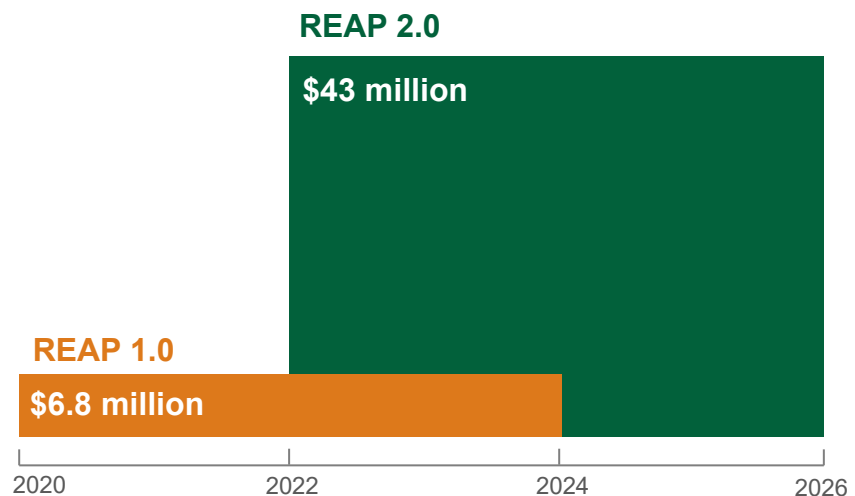
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Program Development

Input from Member Agencies & Stakeholders

- Better understand the challenges in achieving housing production goals
- Needs assessment and SANDAG's role

Pro-Housing Best Practices Study

- Establish a baseline of information about regional housing trends
- Develop an understanding of pro-housing best practices

EDUCATION AND OUTREACH ADU program
Funding for GIS AND TECHNOLOGY TOOLS
Housing and Infrastructure
Pro-Housing Training CONSULTING BENCH
REGIONAL COLLABORATION Housing Legislation Training
CEQA Streamlining Training
STAFF AUGMENTATION

Pro-Housing Best Practices for the San Diego Region
September 2021

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HAP Strategy

Outlines goals, policies, and actions to accelerate affordable, fair, and sustainable housing production across the San Diego region.

Guides SANDAG as programs are developed to address the housing crisis and reach our regional housing and climate goals.

Near-term and continuous implementations actions.

SANDAG
Housing Acceleration Program Strategy
September 2022
SANDAG.org

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Core Strategies & Activities

Local Jurisdiction Support

- Planning Grants
- Technical Assistance
- Education and Outreach
- Sustainable Communities On-Call

Data Analysis & Policy Resources

- Pro-housing Best Practices
- Housing Policy and Planning Tool
- Anti-Displacement Strategy

Regional Initiatives

- Regional Convenings
- Regional financing and revenue opportunities
- Regional Studies
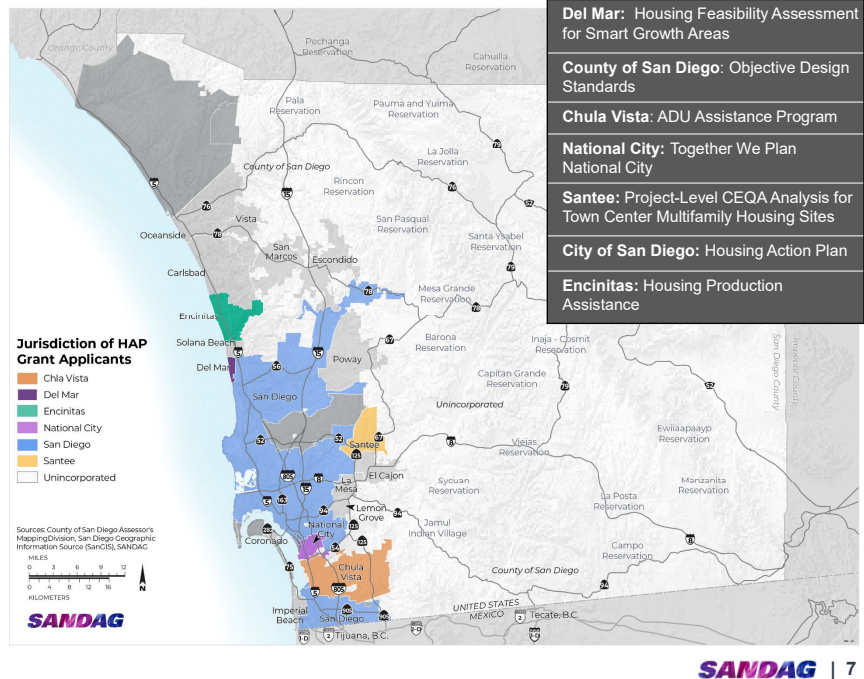
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REAP 1.0 Funded Activities

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Local Jurisdiction Support

HAP Cycle 1 Grant Program

7 planning projects

$1,935,243

Del Mar: Housing Feasibility Assessment for Smart Growth Areas

County of San Diego: Objective Design Standards

Chula Vista: ADU Assistance Program

National City: Together We Plan National City

Santee: Project-Level CEQA Analysis for Town Center Multifamily Housing Sites

City of San Diego: Housing Action Plan

Encinitas: Housing Production Assistance

Jurisdiction of HAP Grant Applicants
- Chla Vista
- Del Mar
- Encinitas
- National City
- San Diego
- Santee
- Unincorporated

Source: County of San Diego Assessor's Mapping Division, San Diego Geographic Information Source (SanGIS), SANDAG

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Local Jurisdiction Support

Technical Assistance Program

SANDAG's HAP Technical Assistance
- Trainings and Webinars
- Engagement, Communication, Collaboration
- Sub-regional Meetings and Focus Groups
- Legislative Tracking and Interpretation
- Templates, Toolkits, and Memos
- Local Staffing Assistance
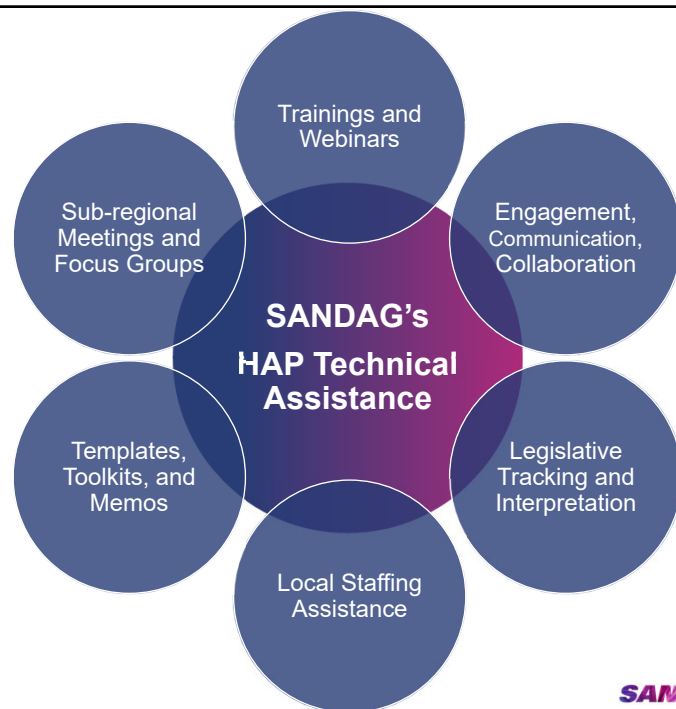
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Data Analysis & Policy Resources

Housing Policy & Planning Tool (HPPT)

SANDAG Open Data Portal

Welcome to SANDAG's Open Data Portal. We invite you to explore, visualize, and download publicly accessible data for the San Diego region.

CIBRS Crime Data | Commercial Vehicle Survey | Community Characteristics | Criminal Justice Research Clearinghouse

Employment Centers | GIS Data Clearinghouse — San Diego's Regional GIS Data Source | Highway Traffic Data — Average daily traffic volumes | Housing Policy and Planning Tool

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HPPT

Affordable Housing Case Studies

Housing Policy Resources

Accessory Dwelling Unit Report

RHNA Dashboard

Housing Element Compliance

APR Housing Data Explorer

Anti Displacement Strategies

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Regional Initiatives

Housing Policy Leadership Academy (HPLA)

Forum for leaders and housing professionals to explore the relationship between policy, planning, and housing development
10 Sessions
- 2 cohorts graduated in December 2022 and another cohort will graduate in May 2024.

Housing Policy Bootcamp

4-week intensive course which challenges HPLA alumni to learn the essentials of policy analysis and policy development

Policy Forums

Housing Legislative Overview
February 2022

Equitable Homeownership
August 2022 (joint with SCAG)

Housing Legislative Overview
November 2022 (joint with SCAG)

Rethinking Social Housing for California
March 2023 (joint with SCAG)

2023 New State Housing Laws Overview
November 2023 (joint with ABAG)

2024 State Housing Law & Budget Overview
February 2024

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Regional Initiatives

Capital Mapping Report

Comprehensive list of potential funding sources for planning and capital projects that support housing production, including information on funding criteria, timelines, etc.

Regional Value Capture Study

Identifies and evaluates value capture instruments and joint development opportunities for the San Diego region.
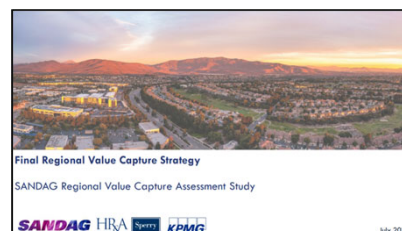
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REAP 2.0 Proposed Uses

REAP 2.0 Objectives

Accelerating Infill Development

Affirmatively Furthering Fair Housing (AFFH)

Reducing Vehicle Miles Travelled (VMT)

REAP 2.0 Activities

- Local Jurisdiction Support
- Affordable Housing Programs
- Transit Agency Partnership
- Tribal Partnership

Local Jurisdiction Support

- HAP Cycle 2 Grants
  - $12.3 million awarded
    - 12 planning projects
    - 3 capital projects
- Technical Assistance
- Housing Policy and Planning Tool

Affordable Housing Programs

- Implementation of an evergreen regional housing trust fund
  - $15M to be leveraged with other government and philanthropic funds to directly support affordable housing development.
- Statewide Funding Coordination (e.g., AHSC)
- Analysis on housing finance

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Transit Agency Partnerships

- Coordination with Metropolitan Transit System (MTS) and North County Transit District (NCTD).
- Affordable housing and redevelopment at transit hubs with workforce housing
- Advancement of transit-oriented development (TOD)

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Tribal Partnership

- $2M for the Southern California Tribal Chairmans Association (SCTA)

- Complement each Tribe's existing housing program to meet both current and future needs

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HAP Next Steps

REAP 1.0

- Conclude activities funded through this program
- Complete and submit close-out report

REAP 2.0

- Build out next TA program
- Continue advocating for funding
- Wait on final budget

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