



MEETING OF THE

COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE

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Transportation
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Thursday, April 2, 2015
10:00 a.m. – 10:45 a.m.

SCAG Main Office
818 W. 7th Street, 12th Floor
Policy Committee Room B
Los Angeles, CA 90017
(213) 236-1800

If members of the public wish to review the attachments or have any questions on any of the agenda items, please contact Lillian Harris-Neal at (213) 236-1858 or via email harris-neal@scag.ca.gov

Agendas & Minutes for the Community, Economic, and Human Development Committee are also available at:
<http://www.scag.ca.gov/committees/Pages/default.aspx>

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**Community, Economic, and Human Development Committee
Members – April 2015**

<u>Members</u>		<u>Representing</u>
Chair* 1. Hon. Margaret E. Finlay	<i>Duarte</i>	District 35
Vice Chair* 2. Hon. Bill Jahn	<i>Big Bear Lake</i>	District 11
3. Hon. Wendy Bucknum	<i>Mission Viejo</i>	OCCOG
4. Hon. Carol Chen	<i>Cerritos</i>	GCCOG
* 5. Hon. Steven Choi	<i>Irvine</i>	District 14
6. Hon. Jeffrey Cooper	<i>Culver City</i>	WSCCOG
* 7. Hon. Barbara Delgleize	<i>Huntington Beach</i>	District 64
8. Hon. Rose Espinoza	<i>La Habra</i>	OCCOG
9. Hon. Kerry Ferguson	<i>San Juan Capistrano</i>	OCCOG
10. Hon. Debbie Franklin	<i>Banning</i>	WRCOG
* 11. Hon. James Gazeley	<i>Lomita</i>	District 39
12. Hon. Julie Hackbarth-McIntyre	<i>Barstow</i>	SANBAG
13. Hon. Tom Hansen	<i>Paramount</i>	GCCOG
14. Hon. Robert Joe	<i>South Pasadena</i>	Arroyo Verdugo
* 15. Hon. Barbara Kogerman	<i>Laguna Hills</i>	District 13
16. Hon. Paula Lantz	<i>Pomona</i>	SGVCOG
17. Hon. Joe Lyons	<i>Claremont</i>	SGVCOG
18. Hon. Charles Martin		Morongo Band of Mission Indians
* 19. Hon. Larry McCallon	<i>Highland</i>	District 7
20. Hon. Joseph McKee	<i>Desert Hot Springs</i>	CVAG
21. Hon. Susan McSweeney	<i>Westlake Village</i>	LVMCOG
* 22. Hon. Carl Morehouse	<i>Ventura</i>	District 47
* 23. Hon. Gene Murabito	<i>Glendora</i>	District 33
24. Hon. Ray Musser	<i>Upland</i>	SANBAG
* 25. Hon. Steve Nagel	<i>Fountain Valley</i>	OCCOG
* 26. Hon. John Nielsen	<i>Tustin</i>	District 17
27. Hon. Edward Paget	<i>Needles</i>	SANBAG
28. Hon. Jim Predmore	<i>Holtville</i>	ICTC
29. Hon. John Procter	<i>Santa Paula</i>	VCOG
* 30. Hon. Rex Richardson	<i>Long Beach</i>	District 29
* 31. Hon. Julio Rodriguez	<i>Perris</i>	District 69
32. Hon. Sonny R. Santa Ines	<i>Bellflower</i>	GCCOG
33. Hon. Becky Shevlin	<i>Monrovia</i>	SGVCOG
* 34. Hon. Tri Ta	<i>Westminster</i>	District 20
35. Hon. Ray Torres		Torres Martinez Band of Cahuilla Indians
36. Hon. Frank Zerunyan	<i>Rolling Hills Estates</i>	SBCCOG

*Regional Council Member

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COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE AGENDA APRIL 2, 2015

The Community, Economic and Human Development (CEHD) Committee may consider and act upon any of the items listed on the agenda regardless of whether they are listed as Information or Action Items.

CALL TO ORDER & PLEDGE OF ALLEGIANCE

(Hon. Margaret E. Finlay, Chair)

ELECTION OF CHAIR AND VICE CHAIR

PUBLIC COMMENT PERIOD – Members of the public desiring to speak on items on the agenda, or items not on the agenda, but within the purview of the Committee, must fill out and present a speaker’s card to the Assistant prior to speaking. Comments will be limited to three (3) minutes. The Chair may limit the total time for all comments to twenty (20) minutes.

REVIEW AND PRIORITIZE AGENDA ITEMS

ACTION ITEMS:

	<u>Time</u>	<u>Page No.</u>
1. <u>Minutes of the March 5, 2015 Meeting</u>	Attachment	1
2. <u>Final Report and Recommendations of the Regional Housing Needs Assessment (RHNA) and Housing Element Reform Subcommittee</u> <i>(Huasha Liu, Director, Land Use and Environmental Planning)</i>	Attachment 20 mins.	6
Recommended Action: Review and approve Final Report and recommendations of the RHNA and Housing Element Reform Subcommittee (Subcommittee), and recommend approval by the Regional Council.		
3. <u>Cap-and-Trade Greenhouse Gas Reduction Fund: Affordable Housing & Sustainable Communities (AHSC) Program/ SCAG Evaluation Criteria</u> <i>(Hasan Ikhata, Executive Director)</i>	Attachment 10 mins	50
Recommended Action: Recommend Regional Council approval of the Evaluation Criteria to be applied by SCAG staff in evaluating full applications prepared for projects in the SCAG region for the AHSC Program.		



COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE AGENDA APRIL 2, 2015

CONSENT CALENDAR

Time Page No.

Receive and File

- | | | |
|--|-------------------|-----------|
| 4. <u>2015 Regional Council and Policy Committees Meeting Schedule</u> | Attachment | 59 |
| 5. <u>SCAG Sustainability Planning Grants Program – Monthly Update</u> | Attachment | 60 |
| 6. <u>Geographic Information System (GIS) Rollout: SCAG GIS Services Program</u> | Attachment | 68 |
| 7. <u>2015 Active Transportation Program (ATP) Regional Guidelines</u> | Attachment | 70 |

CHAIR’S REPORT

(Hon. Margaret E. Finlay, Chair)

STAFF REPORT

(Frank Wen, SCAG Staff)

FUTURE AGENDA ITEM/S

ANNOUNCEMENT

SCAG Regional Conference and General Assembly, May 7-8, 2015, to be held at the JW Marriott Desert Springs Resort & Spa, 78455 Country Club Drive, Palm Desert, CA 92260. [Click here to register.](#)

ADJOURNMENT

The next CEHD Committee meeting is scheduled for Thursday, June 4, 2015, at the SCAG Los Angeles Office.

**COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE
of the
SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS**

**March 5, 2015
Minutes**

THE FOLLOWING MINUTES ARE A SUMMARY OF ACTIONS TAKEN BY THE COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE. AN AUDIO RECORDING OF THE ACTUAL MEETING IS AVAILABLE FOR LISTENING.

The Community, Economic & Human Development Committee held its meeting at SCAG's downtown Los Angeles office.

Members Present

Hon. Marion Ashley	County of Riverside
Hon. Carol Chen, Cerritos	GCCOG
Hon. Steven Choi, City of Irvine	District 14
Hon. Jeffrey Cooper, Culver City	WSCCOG
Hon. Margaret Finlay, Duarte (Chair)	District 35
Hon. Debbie Franklin, Banning	WRCOG
Hon. James Gazeley, Lomita	District 39
Hon. Tom Hansen, City of Paramount	GCCOG
Hon. Bill Jahn, Big Bear Lake (Vice-Chair)	District 11
Hon. Robert Joe, South Pasadena	Arroyo Verdugo Cities
Hon. Barbara Kogerman, Laguna Hills	District 13
Hon. Paula Lantz, Pomona	District 38
Hon. Joe Lyons, City of Claremont	SGVCOG
Hon. Larry McCallon, Highland	District 7
Hon. Joe McKee, City of Desert Hot Springs	CVAG
Hon. Carl Morehouse, San Buenaventura	District 47
Hon. Ray Musser, Upland	SANBAG
Hon. Steve Nagel, City of Fountain Valley	OCCOG
Hon. John Nielsen, Tustin	District 17
Hon. Ed Paget, Needles	SANBAG
Hon. Jim Predmore, Holtville	ICTC
Hon. John Procter, Santa Paula	VCOG
Hon. Rex Richardson, Long Beach	District 29
Hon. Julio Rodriguez, Perris	District 69
Hon. Sonny Santa Ines, Bellflower	GCCOG
Hon. Tri Ta, Westminster	District 20
Hon. Frank Zerunyan, Rolling Hills Estates	SBCCOG

Members Not Present

Hon. Rose Espinoza, City of La Habra	OCCOG
Hon. Julie Hackbarth-McIntyre, Barstow	SANBAG
Hon. Charles Martin	Morongo Band of Mission Indians
Hon. Susan McSweeney, Westlake Village	LVMCOG
Hon. Gene Murabito, Glendora	SGVCOG
Hon. Becky Shevlin, Monrovia	SGVCOG
Hon. Ray Torres	Torres-Martinez Desert Cahuilla Indians

CALL TO ORDER & PLEDGE OF ALLEGIANCE

Hon. Margaret Finlay, Chair, called the meeting to order at 10:20 AM. Hon. Steve Nagel led the Committee in the Pledge of Allegiance.

The Chair introduced five (5) new members to the CEHD committee, as follows: Hon. Marion Ashley, representing the County of Riverside, Hon. Barbara Kogerman, representing District 13, Hon. Jim Predmore, representing ICTC, Hon. John Procter, representing VCOG, and Hon. Rex Richardson, representing District 29.

PUBLIC COMMENT PERIOD

Melanie Schlotterbeck, representing Friends of Harbors, Beaches, and Parks, stated that her organization continues to support natural land and conservation in the SCAG region.

REVIEW AND PRIORITIZE AGENDA ITEMS

There was no reprioritization of the agenda.

CONSENT CALENDAR

Approval Item

1. Minutes of the September 11, 2014 Meeting

Receive and File

2. 2015 Regional Council and Policy Committees Meeting Schedule
3. Regional Guidelines for 2015 Active Transportation (Funding) Program (ATP)
4. Potential Policy Committee Meetings and Agenda Items Related to the Development of the 2016-2040 Regional Transportation Plan/Sustainable Communities Strategy (2016 RTP/SCS) for the Next Eight (8) Months
5. U.S. Department of Transportation (USDOT) Mayors' Challenge for Safer People, Safer Streets
6. 2015 Local Profiles Status Update

7. SCAG Sustainability Planning Grants Program – Monthly Update
8. Cap-and-Trade Greenhouse Gas Reduction Fund: Affordable Housing and Sustainable Communities Program Update – Concept Applications Process & Recommendation
9. 2016-2040 Regional Transportation Plan and Sustainable Communities Strategy (2016 RTP/SCS) Public Health Integration

A MOTION was made (Choi) to approve the Minutes of the October 2, 2014 meeting. The MOTION was SECONDED (Franklin) and APPROVED by the following vote:

AYES: Chen, Choi, Cooper, Finlay, Franklin, Gazeley, Hansen, John, Joe, Lantz, Lyons, McCallon, McKee, Morehouse, Musser, Nagel, Nielsen, Paget, Richardson, Rodriguez, Santa Ines, Ta, Zerunyan,

NOES: None

ABSTAIN: Kogerman, Ashley, Predmore, Procter

A MOTION was made (Jahn) to Receive and File Items 2-9. The MOTION was SECONDED (Morehouse) and APPROVED by the following vote:

AYES: Ashley, Chen, Choi, Cooper, Finlay, Franklin, Gazeley, Hansen, Jahn, Joe, Kogerman, Lantz, Lyons, McCallon, McKee, Morehouse, Musser, Nagel, Nielsen, Paget, Predmore, Procter, Richardson, Rodriguez, Santa Ines, Ta, Zerunyan

NOES: None

ABSTAIN: None

INFORMATION ITEMS

10. Exposition Light Rail Line Study – Implications for Transit Oriented Development (TOD)
Dr. Marlon Boarnet, Senior Associate Dean for Academic Affairs, Director, Graduate Programs in Urban Planning and Professor of Planning, University of Southern California, presented the findings of his Exposition Light Rail Line Study, providing studies of the travel and traffic impacts before and after the new Light Rail Transit Service. Dr. Boarnet highlighted the policy implications from the rail transit investment program in Los Angeles, such as robust traffic improvement, and the impact of local land use characteristics on light rail travel.
11. Introduction to SCAG’s Upcoming Environmental Justice Analysis for the 2016-2040 Regional Transportation Plan/Sustainable Communities Strategy (2016 RTP/SCS)

Kimberly Clark, Senior Regional Planner, provided an overview of the Federal and State Requirements for SCAG's Environmental Justice Program. Ms. Clark also provided background on the work completed for the 2012-2035 RTP/SCS, and the potential technical approaches for assessing impacts for the 2016-2040 RTP/SCS.

12. Preliminary 2016-2040 Regional Transportation Plan/Sustainable Communities Strategy (2016 RTP/SCS) Scenario Planning Matrix
Jason Greenspan, Manager of Sustainability, presented an introduction and overview of the Preliminary 2016 RTP/SCS Scenario Planning Matrix. Mr. Greenspan outlined the four (4) RTP/SCS planning scenarios related to various inputs and outputs, which will help inform policy discussions. Mr. Greenspan stated that the scenario planning process will be highlighted at the General Assembly in May 2015, and will be used as the foundation for developing the 2016 RTP/SCS.

CHAIR'S REPORT

There was no Chair's Report presented.

STAFF REPORT

Frank Wen, Manager of Research & Analysis, announced that 700 Forms and Direct Deposit Forms were available at the front table if members need them. Dr. Wen also announced the upcoming election of a new Chair and Vice Chair at the April CEHD meeting. Dr. Wen encouraged members to submit their nominations as early as possible in case paper ballots need to be prepared.

FUTURE AGENDA ITEMS

There were no future agenda items presented.

ANNOUNCEMENTS

There were no announcements presented.

ADJOURNMENT

The Chair adjourned the meeting at 11:55 AM.

Minutes Approved By:



Frank Wen, Manager
Research & Analysis

Community, Economic & Human Development Committee Attendance Report

2015

Member (including Ex-Officio) LastName, FirstName	Representing	X = County Represented						X = Attended		No Meeting	NM = New Member	EA = Excused Absence												
		IC	LA	OC	RC	SB	VC	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec					
Ashley, Marion	County of Riverside				X					X														
Chen, Carol	Gateway Cities		X							X														
Choi, Steven	City of Irvine (District 14)			X						X														
Cooper, Jeffrey	WSCCOG		X							X														
Espinoza, Rose	OCCOG			X																				
Finlay, Margaret* (Chair)	Duarte (District 35)		X							X														
Franklin, Debbie	WRCOG				X					X														
Gazeley, James*	Lomita (District 39)		X							X														
Hansen, Tom	Gateway Cities									X														
Jahn, Bill* (Vice-Chair)	SANBAG (District 11)					X				X														
Joe, Robert	Arroyo Verdugo		X							X														
Kogerman, Barbara	District 13			X						NM														
Lantz, Paula	Pomona (District 38)		X							X														
Lyons, Joe	SGVCOG		X							X														
Martin, Charles	Morongo Indians				X																			
McCallon, Larry*	Highland (District 7)					X				X														
Hackbarth-McIntyre, Julie	SANBAG																							
McKee, Joe	CVAG				X					X														
McSweeney, Susan	Las Virgenes/Malibu COG		X																					
Morehouse, Carl*	VCOG (District 47)						X			X														
Murabito, Gene*	SGVCOG		X																					
Musser, Ray	SANBAG					X				X														
Nagel, Steve	OCCOG			X						X														
Nielsen, John*	Tustin (District 17)			X						X														
Paget, Ed	SANBAG					X				X														
Predmore, Jim	ICTC	X								NM														
Procter, John	VCOG						X			NM														
Richardson, Rex	District 29		X							NM														
Rodriguez, Julio	District 69									X														
Santa Ines, Sonny	GCCOG		X							X														
Shevlin, Becky	SGVCOG		X																					
Ta, Tri*	District 20			X						X														
Torres, Ray	Torres Martinez				X																			
Zerunyan, Frank	SBCCOG		X							X														
Regional Council Member*																								

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DATE: April 2, 2015

TO: Community, Economic and Human Development (CEHD) Committee

FROM: Huasha Liu, Director, Land Use and Environmental Planning, 213-236-1838, liu@scag.ca.gov

SUBJECT: Final Report and Recommendations of the Regional Housing Needs Assessment (RHNA) and Housing Element Reform Subcommittee

EXECUTIVE DIRECTOR'S APPROVAL: 

RECOMMENDED ACTION:
Review and approve Final Report and recommendations of the RHNA and Housing Element Reform Subcommittee (Subcommittee), and recommend approval by the Regional Council.

EXECUTIVE SUMMARY:
The RHNA and Housing Element Reform Subcommittee has reviewed various issues relating to RHNA and housing elements and over its past six (6) meetings has made recommendations to address these issues. The topics of reform covered (1) the RHNA determination process; (2) RHNA allocation development for local jurisdictions; (3) the revision request and appeals processes; and (4) housing element development and funding incentives. SCAG staff has compiled the Subcommittee's recommendations into this staff report, and after approval by the CEHD Policy Committee, it will be forwarded to the Regional Council for approval.

STRATEGIC PLAN:
This item supports SCAG's Strategic Plan; Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; Objective a: Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans.

BACKGROUND:
At its prior meetings, held on October 23, 2013, January 23, 2014, March 13, 2014, May 29, 2014, and September 29, 2014, respectively, the Subcommittee reviewed a matrix of topics for discussion and possible action related to RHNA and housing element reform. The purpose of the Subcommittee is to discuss and provide guidance to SCAG staff on these topics. The topics were raised by a variety of stakeholders, including Subcommittee members, local jurisdictions, other interested groups, as well as SCAG staff who identified a few items for discussion.

To allow for focused discussions and meeting efficiency, the Subcommittee approved its meeting schedule by topic area. Each Subcommittee meeting focused on different areas of the RHNA and Housing Element processes in order to maximize participation on the topics. Topics were compiled in a matrix format and arranged by the potential avenue for reform. Section A focused on possible changes done internally at SCAG; Section B focused on reform by coordination with the California Department of Housing and

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Community Development (HCD); and Section C included reform topics that would need to be addressed through legislation. The matrix cells reference the version dated March 3, 2014.

To maximize time allotted for discussion, meeting topics were arranged by focus area rather than by avenue for reform. For example, topics focused on the development of the RHNA allocation were scheduled for review and discussion at meeting #3, while topics focused on housing element development were scheduled for meeting #5. Staff provided the Subcommittee with background information on each topic of reform and its recommended actions and the topics were discussed and acted upon by the Subcommittee after such discussion.

Importantly, Mr. Glen Campora, Assistant Deputy Director from the HCD, which is the State agency responsible for providing councils of governments such as SCAG its regional housing need determination as part of the RHNA process and also for reviewing updates of local housing elements by jurisdictions, participated in all Subcommittee meetings and provided significant information regarding the discussion topics.

Recommendations made by the Subcommittee from its prior meetings were compiled in the following section and are also reflected in the attached Final Report. These recommendations were affirmed by the Subcommittee at its sixth and final meeting held on March 18, 2015 with the action that these recommendations be forwarded to the CEHD Committee and the Regional Council for review and approval. If the CEHD Committee approves the Subcommittee's recommendations, SCAG staff will present these recommendations to the Regional Council.

Actions from Meeting 2 (January 23, 2014): SCAG-related administrative issues pertaining to the RHNA process; RHNA regional determination process

1. Item A3: Include in the Subcommittee's overall recommendations a statement that SCAG will continue to make funding available for jurisdictions that accept RHNA delegation during the 6th cycle RHNA process, based on available resources and policy discussions of the Subcommittee, CEHD Policy Committee, and Regional Council.
2. Item A5: Explore the feasibility of having RHNA Subcommittee meetings webcasted live during the 6th cycle RHNA process, similar to the webcasting technology used for Regional Council meetings.
3. Item A10: Include in the Subcommittee's overall recommendations a statement that SCAG staff will continue to notify planning directors, city managers, and other stakeholders of RHNA-related material and meetings, including having a designated point of contact similar to the local input communication protocol established for the 2016-2040 Regional Transportation Plan/Sustainable Communities Strategy (2016 RTP/SCS) process. The jurisdiction's point of contact should be the same individual designated for the 2016 RTP/SCS to provide for historical reference and avoid discussion with two (2) separate individuals; in addition, SCAG staff will have a process in place to confirm that the jurisdiction's contact is still there.
4. Item B3: Continue dialogue and seek official confirmation with HCD on the issue of exclusion of Tribal land growth from regional RHNA allocations.

5. Item B4: Continue dialogue and collaborate with HCD and the staff of the appropriate committee of the State Legislature to include in a future Omnibus Bill a technical correction to the existing RHNA law with respect to regional population growth. SCAG recommends that the 3% allowable difference in population projections during the regional determination process be applied only to the total population.

Note: At its January 23, 2014 meeting, the RHNA and Housing Element Reform Subcommittee recommended that SCAG staff explore whether a technical amendment relating to this topic could be included in an Omnibus Bill for 2014. This amendment is now expected to be considered as part of HCD's upcoming comprehensive statewide reform efforts. At its final meeting, the Subcommittee recommended that the previous Subcommittee action be amended to allow staff to seek this amendment in a future Omnibus Bill.

Actions from Meeting 3 (March 13, 2014): RHNA allocation development for local jurisdictions

6. Item A1: Establishing overarching principles for the 6th RHNA cycle is unnecessary. Incorporate the bottom-up local review process used in most recent RTP/SCS and existing practice of accepting local input as basis of RHNA development (for example, see Attachment 2)¹.
7. Item A2: SCAG staff will continue to encourage and facilitate the RHNA trade and transfer process and develop a sample agreement template during the 6th cycle RHNA process. Language for the trade and transfer policy should be revisited during the development of the 6th cycle RHNA to ensure flexibility for interested parties and to continue consistency with State housing law objectives and laws.
8. Item A7: SCAG staff will continue to follow the communication protocols established in the current local review and input process and work with the RHNA Subcommittee, CEHD Committee, and Regional Council to ensure full participation in the process.
9. Item A8: Continue to conduct extensive outreach with all the jurisdictions and meet with them to solicit their input and review and ensure the accuracy of land use maps and resolving potential discrepancies.
10. Items A11 and C8: Review different formulas and factors to determine the appropriate methodology to address the projected distribution of very-low and low income housing for overburdened communities during the development of the 6th cycle RHNA, beginning in 2018.
11. Item A12: The accuracy of vacancy credit application will be addressed during the 6th cycle RHNA process, beginning in 2018, if the credit is granted again for future cycles.

^[1] The acceptance of local input as the basis of the jurisdiction-level growth forecast and for RHNA purposes was the adoption of the 2012-2035 RTP/SCS by the Regional Council on April 4, 2012, as recommended by the Joint Policy Committee on March 21, 2012. The staff report for the April 4, 2012 Regional Council meeting and corresponding resolution are attached to this staff report.

12. Item B5: Ensure that jurisdictions are aware of data submission timelines during the development of the 6th cycle RHNA so that circumstances such as general plan updates are incorporated into local input as needed.
13. Item B9: Facilitate discussions as necessary with the HCD to ensure that inclusionary zoning ordinances can continue to be accounted for in updates of local housing elements to meet assigned RHNA allocation.

Actions from Meeting 4 (May 29, 2014): Revision request and appeals processes

14. Item A4: The 6th cycle RHNA Subcommittee charter will continue to include the option for the appointment of ex-officio external stakeholders to the 6th Cycle RHNA Subcommittee.
15. Item A6: SCAG staff will continue to meet the legal requirements in conducting the revision and appeal processes for public notice, and providing as much time as possible for local jurisdictions to prepare, file and have adequate lead time to gather information and prepare presentations, accounting for the number of revision request and appeal submissions received and staff resources available.
16. Item A9: In preparation of the 6th cycle RHNA beginning in 2018, SCAG staff will provide a sample packet as a guideline for revision requests and appeals along with examples of past applications that resulted in a granted appeal during the 5th cycle RHNA update. Additionally, SCAG staff will continue to educate jurisdictions on the difference between revision requests and appeals.
17. Item B6: SCAG staff will share the information obtained from a recent survey on “significant and unforeseen change in circumstances” affecting a jurisdiction’s draft RHNA allocation with the HCD and other MPOs so that HCD may in turn develop possible guidance on the matter.

Note: SCAG staff presented initial survey results at the September 29, 2014 Subcommittee meeting and has updated the survey results, which are included as an attachment to the final report of the Subcommittee.

18. Item C1: SCAG staff will continue to follow the separate revision request and appeal processes currently outlined in the state housing law.

Actions from Meeting 5 (September 29, 2014): Housing element development and review; funding and incentives

19. Items B1, B10, C4 and C5: SCAG staff will continue to facilitate discussion between HCD and jurisdictions to address default density options when determining appropriate sites for accommodating low and very-low income households.
20. Item B2: Recommend that HCD consider formalizing the streamlining review policy for existing housing needs data (similar to the process used after completion the 5th cycle RHNA) that allowed

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COGs such as SCAG to develop pre-approved data sets for use by jurisdictions in development the existing housing needs portion of the local housing element update.

21. Item B7: SCAG staff will continue the dialogue with HCD and other State agencies to find opportunities for State-level funding for jurisdictions to assist in the development of housing elements. Moreover, SCAG will continue to assist its local jurisdictions to obtain Cap-and-Trade funding to support Sustainable Communities Strategy (SCS) implementation, including planning for and supplying affordable housing.
22. Items B8 and C2: SCAG staff will continue to provide information to jurisdictions on the RHNA process and housing element update timelines and facilitate discussion with HCD for jurisdictions that need additional time for housing element implementation.
23. Item B9: Continue to support that HCD allow for inclusionary zoning to be counted toward meeting a jurisdiction's future housing needs in its housing element.
24. Item B11: SCAG staff recommends that the State housing law remain unchanged in regard to transitional and supportive housing planning requirements, and for SCAG staff to facilitate discussions between HCD and jurisdictions in need of housing element assistance.
25. Item C6: SCAG staff will facilitate discussion between HCD and jurisdictions regarding community design in housing element review and to continue to allow for jurisdictions to use tools such as inclusionary zoning and affordable housing overlays to meet their respective future housing need.
26. Item C7: SCAG will continue to provide information on CEQA streamlining to SCAG Policy Committees and stakeholders as additional information becomes available, and continue to discuss the topic as part of on-going CEQA modernization efforts.
27. Items D1 and D2: SCAG will continue to coordinate with HCD in an effort to ensure that jurisdictions with compliant housing elements continue to receive streamlined review and funding opportunities as available. Moreover, SCAG will work with the State and our member jurisdictions and stakeholders as part of the Affordable Housing and Sustainable Communities (AHSC) program and identify additional funding opportunities for jurisdictions that build and preserve affordable housing. SCAG will also continue its efforts in facilitating between HCD and local jurisdictions to ensure housing element compliance.

FISCAL IMPACT:

Expenditures related to staff and legal support for the RHNA and Housing Element Reform Subcommittee, along with additional related direct costs (e.g., stipends, meals, mileage and parking), are included as part of the FY 14-15 General Fund Budget.

ATTACHMENT:

1. Final Report of the RHNA and Housing Element Reform Subcommittee

Final Report of the Regional Housing Needs Assessment (RHNA) and Housing Element Reform Subcommittee

The RHNA and Housing Element Reform Subcommittee was convened to discuss and provide recommendations on issues that were raised by various stakeholders during the 5th cycle RHNA. Over the course of six (6) meetings, the Subcommittee has reviewed a large number of issues relating to RHNA and housing elements pertaining to: (1) the RHNA determination process; (2) RHNA allocation development for local jurisdictions; (3) the revision request and appeals processes; and (4) housing element development and funding incentives. The recommendations of the Subcommittee, along with this report and other relevant materials, will be provided as guidance to the 6th cycle RHNA Subcommittee during discussion of RHNA process policy and methodology. Additionally, in the intervening years prior to the 6th cycle RHNA, SCAG staff will continue collaboration with HCD and our stakeholders on RHNA reform and inform the CEHD Policy Committee and Regional Council as updates become available.

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan; Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; Objective a: Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans.

BACKGROUND

Background of RHNA

The California Legislature developed the RHNA process [Government Code Section 65580 et seq. (the "RHNA statute")] in 1977 to address the serious affordable housing shortage in California. The expressed intent of the Legislature in enacting the RHNA statute was as follows:

- “(a) To assure that counties and cities recognize their responsibilities in contributing to the attainment of the state housing goal.
- (b) To assure that counties and cities will prepare and implement housing elements which, along with federal and state programs, will move toward attainment of the state housing goal.
- (c) To recognize that each locality is best capable of determining what efforts are required by it to contribute to the attainment of the state housing goal, provided such a determination is compatible with the state housing goal and regional housing needs.
- (d) To ensure that each local government cooperates with other local governments in order to address regional housing needs.” (Govt. Code § 65581).

5th Cycle RHNA

The 5th cycle RHNA began in May 2009, when SCAG staff began surveying each of the region's jurisdictions on its population, household, and employment projections as part of a collaborative process to develop the Integrated Growth Forecast, which would be used for all regional planning efforts including the 2012-2035 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS). These surveys continued through August 2011. During this time, SCAG staff engaged in extensive communication and data sharing with each jurisdiction in the SCAG region, including in-person meetings, to ensure the highest participation in gathering local input.

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Beginning in January 2011, the 5th cycle RHNA Subcommittee, comprised of Regional Council and Policy Committee members from each of the six SCAG counties, was convened and held regular monthly meetings to discuss the RHNA process, policies, and methodology, and to provide recommended actions to the CEHD Committee. In August 2011, SCAG received its RHNA determination from HCD. HCD determined a range of housing need of 409,060 – 438,030 units for the SCAG region for the period between January 1, 2014 and October 1, 2021. HCD stated that “[t]his range considered the extraordinary uncertainty regarding national, State, and local economies and housing markets,” and that “[f]or this RHNA cycle only, [HCD] made an adjustment to account for abnormally high vacancies and unique market conditions due to prolonged recessionary conditions, high unemployment, and unprecedented foreclosures.” SCAG was required to maintain the regional total need throughout the RHNA process so that it is within the HCD range and is consistent with SCAG’s Integrated Growth Forecast.

At its August 26, 2011 meeting, the 5th cycle RHNA Subcommittee recommended the release of the proposed RHNA Allocation Methodology to the CEHD Committee. The CEHD Committee reviewed, discussed and further recommended the proposed methodology to the Regional Council, which approved the proposed Methodology for distribution on September 1, 2011. During the 60-day public comment period, SCAG met with interested jurisdictions and stakeholders to present on the RHNA process, answer questions, and collect input in addition to holding public hearings to receive verbal and written comments on the proposed Methodology. After the close of the public comment period, on November 3, 2011, the Regional Council adopted the RHNA Methodology.

On December 9, 2011, SCAG released the Draft RHNA Plan as part of the agenda for the 5th cycle RHNA Subcommittee meeting. The Draft RHNA Plan was recommended by the 5th cycle RHNA Subcommittee for further approval by the CEHD Committee and the Regional Council. The CEHD Committee reviewed and recommended the Draft RHNA Plan to the Regional Council on January 5, 2012 and the Regional Council reviewed and approved for distribution the Draft RHNA Plan on February 2, 2012. The Draft RHNA Plan acknowledged a total future housing need of 412,721 units for the SCAG region. In addition, on April 4, 2012, the Regional Council unanimously approved SCAG’s 2012-2035 RTP/SCS, including its jurisdictional level Integrated Growth Forecast.

The RHNA revision requests and appeals processes commenced immediately after the Regional Council’s approval for distribution of the Draft RHNA Plan. The Regional Council delegated authority to the 5th cycle RHNA Subcommittee to review and to make final decisions on RHNA revision requests and appeals pursuant to the 5th cycle RHNA Subcommittee Charter, which was approved by the Regional Council on June 2, 2011. In this capacity, the 5th cycle RHNA Subcommittee was designated as the RHNA Appeals Board. On February 2, 2012 (and amended on May 3, 2012), the Regional Council also adopted Procedures Regarding Revision Requests, Appeals and Trade & Transfers (the “Appeals Procedure”) for jurisdictions wishing to request a revision to their allocated housing need, to appeal their allocated housing need, or to trade and transfer their allocated housing need. The existing law and the procedures defined the parameters and basis for a successful revision or appeal. The Appeals Procedure was made available to all SCAG jurisdictions and posted on SCAG’s website.

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The RHNA Appeals Board concluded its review and consideration of revisions and appeals. Specifically, the RHNA Appeals Board reviewed, discussed and considered the revision requests of 14 jurisdictions and the appeals of 12 jurisdictions. Revision requests to the Draft RHNA Plan were heard by the RHNA Appeals Board on April 19, 2012, while appeals to the Draft RHNA Plan were heard by the RHNA Appeals Board as part of public hearings held over two days on July 12 and July 13, 2012. The RHNA Appeals Board ratified its written determinations on the appeals on July 24, 2012. The RHNA Appeals Board approved a reduction of 544 units in revision requests. The RHNA Appeals Board approved zero reduction of units in appeals, finding that none of the basis of the appeals could be supported by the RHNA law. As previously indicated, the RHNA Appeals Board was delegated by the Regional Council to review and make the final decisions regarding revision requests and appeals submitted by jurisdictions. The result of the revision requests and appeals processes adjusted the total regional housing need to 412,137 units.

Once the Proposed Final RHNA Plan was recommended for approval by the 5th cycle RHNA Subcommittee and the CEHD Committee, a public hearing to adopt the Final RHNA Plan was held by the Regional Council on October 4, 2012. Following the adoption of the Final RHNA Plan, SCAG submitted the Final RHNA Plan to HCD. HCD reviewed the Final RHNA Plan and on November 26, 2012, and determined it was consistent with the existing and projected housing need for the region.

Once the Final RHNA Plan was adopted by SCAG, jurisdictions in the SCAG region had one year per State law, to complete and adopt their local housing element update based on respective comments and findings by HCD. The deadline for the jurisdictions to adopt their 5th cycle local housing element updates was October 15, 2013. As of February 25, 2015, 158 jurisdictions have adopted an element that HCD found in compliance with State housing element law.

RHNA and Housing Element Reform Subcommittee

During the 5th cycle RHNA process, the 5th cycle RHNA Subcommittee reviewed and provided guidance to SCAG staff that culminated in the adoption of the Final RHNA Plan in October 2012. A number of issues pertaining to the RHNA, housing element process, and the corresponding state law were raised during the process. Subsequently, at its March 2013 meeting, the Regional Council approved the CEHD Committee recommendation to reconvene the RHNA Subcommittee for six (6) months and fund additional costs (staffing, stipends, mileage, meals, etc.) with General Fund reserves. While most RHNA Subcommittee members continued their position on the RHNA and Housing Element Reform Subcommittee, new members were appointed by the SCAG President to replace those who did not continue in public office or chose not to participate in the newly formed Subcommittee.

Subcommittee meetings were arranged by topic to create opportunities for in-depth Subcommittee discussions. The meetings listed in the table below outline topics by category. Analyses for each topic were provided as part of the staff reports for each corresponding meeting agenda. SCAG staff arranged topics into a matrix that outlined potential reform topics suggested by stakeholders or SCAG staff, the existing practice for each topic, and SCAG staff's preliminary recommendations (attachment 2). At each meeting, the Subcommittee discussed each suggested reform topic scheduled for that meeting and took action on recommending

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whether and how to address the reform. Mr. Glen Campora, Assistant Deputy Director from the HCD, participated in all Subcommittee meetings and provided significant information regarding the discussion topics.

The table below summarizes the area of topic discussion for each meeting and summarizes the topic of discussion with corresponding RHNA and Housing Element Reform Matrix cell(s) in attachment 2.

Meeting	Meeting Date	Area of topic	Topic of Discussion
1	October 23, 2013	Subcommittee charter; Subcommittee topic outlook and schedule	<ul style="list-style-type: none"> • Subcommittee charter • Topic outlook
2	January 23, 2014	SCAG administrative-related issues; RHNA regional determination process	<ul style="list-style-type: none"> • Teleconferencing (A5) • Communication with planning directors (A10) • Funding for RHNA delegation (A3) • Growth on Tribal lands (B3) • Margin between SCAG and Department of Finance projections (B4)
3	March 13, 2014	Development of RHNA allocations	<ul style="list-style-type: none"> • Preliminary draft of RHNA allocation (A7) • Local input on growth forecast (A1, A8, B9) • Facilitation of trade and transfers (A2) • Consideration of general plan development and implementation (B5) • RHNA Methodology Issues (A11, A12, C8)
4	May 29, 2014	Revision request and appeals processes	<ul style="list-style-type: none"> • Neutral third party hearing board (A4) • Sample template of appeals (A9) • Posting to SCAG staff responses to filed revision requests and appeals (A6) • Revision request and appeals processes timeline (C1)

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			<ul style="list-style-type: none"> • Definition of change in circumstances (B6)
5	September 29, 2014	Housing element review; funding and other considerations	<ul style="list-style-type: none"> • Smaller city exceptions (C4) • Credit for inclusionary zoning (B9) • Default density ranges and mixed use designations (B1, B10, C5) • Transitional and Supportive Housing Requirements (B11) • Existing housing needs statistics preparation, usage, and review (B2) • Housing element preparation and implementation timeline (B8, C2) • Housing element compatibility with community design (C6) • Funding for RHNA and housing element preparation (B7) • Incentives for housing element compliance and affordable housing building activity (D1, D2) • CEQA exemptions for housing elements (C7)
6	March 18, 2015	Finalization of recommendations	<ul style="list-style-type: none"> • Summary of discussion of approval of recommended actions

At its final meeting, held on March 18, 2015, the Subcommittee reviewed all of its recommendations and approved them for further recommendation by the CEHD Policy Committee for its April 2, 2015 meeting.

Highlights of Actions and Next Steps

Because SCAG is currently in between RHNA cycles, a number of the actions were recommended by the RHNA and Housing Element Reform Subcommittee to be revisited by the 6th cycle RHNA Subcommittee, beginning in 2018. These include (with corresponding matrix cell noted):

- Develop a sample agreement template for RHNA trade and transfers (A2)
- Provide a sample packet as a guideline for revision requests and appeals (A9)

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- Review different formulas and factors to address the projected distribution of very-low and low income housing for overburdened communities (A11)

In addition to recommendations to be reviewed during the development of the 6th cycle RHNA, the Subcommittee also recommended ongoing facilitation of discussion and statewide collaboration with HCD on several issues. These include (with corresponding matrix cell noted):

- Streamlining housing element review (B2)
- Projected regional population growth differences between the Department of Finance and the Council of Government during consultation with HCD (B4)
- Defining “significant and unforeseen change in circumstance” for the RHNA appeals process (B6)
- Funding for the development of housing elements (B7)

The recommendations of the Subcommittee, along with this report and other relevant materials, will be provided as guidance to the 6th cycle RHNA Subcommittee during discussion of RHNA process policy and methodology. Additionally, in the intervening years prior to the 6th cycle RHNA, SCAG staff will continue collaboration with HCD and our stakeholders on RHNA reform and inform the CEHD Policy Committee and Regional Council as updates become available.

FISCAL IMPACT:

Expenditures related to staff and legal support for the RHNA and Housing Element Reform Subcommittee, along with additional related direct costs (e.g., stipends, meals, mileage and parking), are included as part of the FY 14-15 General Fund Budget.

ATTACHMENTS:

1. Matrix of RHNA and Housing Element Reform Topics
2. Updated Report on Change in Circumstance Survey Results

Regional Housing Needs Assessment (RHNA) and Housing Element Reform Topic Outlook Matrix

The following identifies matters that were raised as part of the 5th cycle RHNA process, including suggested ideas for potential RHNA or Housing Element reform, SCAG staff’s initial response and/or recommendation, and the recommendations by RHNA and Housing Element Reform Subcommittee with respect to the specific matter. The matrix is separated into three categories: (A) topics that involve a possible “SCAG process refinement”; (B) topics that involve possible “HCD Administrative changes” and (C) topics that involve possible “Legislative changes.” A final category, section D, has been added to identify topics related to RHNA and housing element reform but involve programs and policies outside of state housing law. Some of the recommendations noted below will require further action beyond the SCAG Regional Council, including discussion and possible action by other stakeholders, such as the State Department of Housing and Community Development (HCD), other Council of Governments (COGs), housing advocates, and the California League of Cities, as appropriate. SCAG appreciates that HCD is committed to working with SCAG to maximize opportunities for RHNA and housing element administrative changes, and we look forward to the continuing collaboration with HCD staff.

SCAG staff has prepared this topic matrix to provide a concise summary pf the topics discussed with the RHNA and Housing Element Reform Subcommittee (topics not listed in priority order).

A) SCAG Process Refinement

The following are topics that may involve possible changes to the current SCAG RHNA process. It should also be noted that many of these topics are best addressed as part of the 6th cycle RHNA process though SCAG staff recognizes the importance of identifying these issues at this time.

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
A1	RHNA	Procedures to develop overarching principles regarding the local input process should be established. Some suggested reforms include a formula or method to manage local input. The process should be simplified as well. (SCAG Staff; Ojai; Sierra Madre; Calabasas, Oxnard; County of Ventura)	During the 5 th RHNA cycle, local input was accepted by SCAG and used as the basis to develop projected household growth.	Develop a procedure to establish overarching principles and guidelines on how to incorporate local input in the RHNA allocation methodology. The exact principles and guidelines, for example, how to incorporate local input and AB 2158 factors (including, but not limited to jobs-housing balance, proximity to transit, and open space), should be discussed during the 6 th cycle RHNA process by the appointed RHNA Subcommittee. Recommend to be revisited and implemented before 6 th cycle RHNA process beginning in 2018. For continual education for the Regional Council, SCAG will provide regular updates on the RHNA process in between cycles.	Establishing overarching principles for the 6 th RHNA cycle is unnecessary. Incorporate the bottom-up local review process used in most recent RTP/SCS and existing practice of accepting local input as basis of RHNA development. <i>(Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).</i>
A2	RHNA	SCAG should encourage and facilitate “appropriate” trade and transfer. Make facilitation services available to jurisdictions that elect to conduct a Trade and Transfer process and provide a sample	“Trade and transfer” is allowed by state housing law and SCAG has developed appropriate guidelines (see Trade and Transfer Guidelines).	SCAG staff will engage the Subcommittee on further discussion of this process and will continue to encourage and facilitate the trade and transfer process. SCAG staff is also open to development a sample agreement template for the 6 th cycle RHNA process.	SCAG staff will continue to encourage and facilitate the RHNA trade and transfer process and develop a sample agreement template during the 6 th cycle RHNA process. Language for the trade and transfer policy should be revisited

		agreement template. (County of Ventura; Brea)			during the development of the 6 th cycle RHNA to ensure flexibility for interested parties and to continue consistency with State housing law objectives and laws. <i>(Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).</i>
A3	RHNA	Identify adequate funding sources for counties to distribute RHNA numbers internally rather than rely on SCAG to conduct that process. (County of Ventura)	Funding sources were available during the RHNA process from the SCAG General Fund to jurisdictions choosing to accept RHNA delegation.	Based on available resources and policy discussions of the Subcommittee and Regional Council, SCAG will continue to make funding available for jurisdictions that accept RHNA delegation.	Include in the Subcommittee’s overall recommendations a statement that SCAG will continue to make funding available for jurisdictions that accept RHNA delegation during the 6 th cycle RHNA process, based on available resources and policy discussions of the Subcommittee, CEHD Policy Committee, and Regional Council. <i>(Recommendation made by Subcommittee on 01/23/14; affirmed by Subcommittee on 03/18/15).</i>
A4	RHNA	A neutral third party should hear RHNA revision request and appeals. (Ojai; Calabasas)	Revision requests and appeals were reviewed and decided by the RHNA Subcommittee/RHNA Appeals Board, which was comprised of SCAG Regional Council and Policy Committee members.	The pros and cons with each approach will be described in a staff report to the Subcommittee for discussion. Recommend to be revisited and implemented during 6 th cycle RHNA process beginning in 2018.	The 6 th cycle RHNA Subcommittee charter will continue to include the option for the appointment of ex-officio external stakeholders to the 6 th Cycle RHNA Subcommittee. <i>(Recommendation made by Subcommittee on 05/29/14; affirmed by Subcommittee on 03/18/15).</i>

A5	RHNA	Utilize teleconference technology to allow for participation from all counties in SCAG to allow for participation of non-Subcommittee members. (County of Ventura)	The RHNA Subcommittee/Appeals Board charter did not make teleconferencing available to the general public for meetings. Videoconferencing was available for most meetings.	There are pros and cons with each approach as well as Brown Act and technology limitations and costs, and will be described in a staff report to the Subcommittee. Recommend to be revisited and implemented during 6 th cycle RHNA process beginning in 2018.	Explore the feasibility of having RHNA Subcommittee meetings webcasted live during the 6th cycle RHNA process, similar to the webcasting technology used for Regional Council meetings. <i>(Recommendation made by Subcommittee on 01/23/14; affirmed by Subcommittee on 03/18/15).</i>
A6	RHNA	Distribute staff responses to a revision request or appeal at least one week prior to the hearing so that adequate time is available to review staff comments. (County of Ventura)	Staff responses to revision requests and appeals were provided prior to the public hearings pursuant to Brown Act (i.e., at least 72 hours prior to hearing).	Staff will continue to meet the legal requirements for public review and will also provide as much additional time as possible accounting for number of responses and staff resources. This applies to both the revision request and appeals processes.	SCAG staff will continue to meet the legal requirements in conducting the revision and appeal processes for public notice, and providing as much time as possible for local jurisdictions to prepare, file and have adequate lead time to gather information and prepare presentations, accounting for the number of revision request and appeal submissions received and staff resources available. <i>(Recommendation made by Subcommittee on 05/29/14; affirmed by Subcommittee on 03/18/15).</i>
A7	RHNA	Identify a preliminary draft RHNA distribution earlier in the process, and provide a formal comment and response system to ensure potential issues with a proposed RHNA distribution are identified and resolved early in the	The opportunity to provide input to the growth projections was made available to all jurisdictions prior to the distribution of the Draft RHNA. Comments provided to staff were responded to and logged in an internal system.	SCAG staff has provided such preliminary information timely to all jurisdictions in the SCAG region. SCAG will continue to do so for the 6 th cycle RHNA process and encourages the participation of all jurisdictions.	SCAG staff will continue to follow the communication protocols established in the current local review and input process and work with the RHNA Subcommittee, CEHD Committee, and Regional Council to ensure full participation in the process. <i>(Recommendation made by Subcommittee on 03/13/14;</i>

		process. (County of Ventura)			affirmed by Subcommittee on 03/18/15).
A8	RHNA	Prior to the next RHNA process, assign technical staff to work with local jurisdictions to develop accurate land use data maps and forecasting models. When necessary, arrange a meeting between local agencies and SCAG managers to resolve issues. (County of Ventura)	SCAG forecast and data staff surveyed local input from all jurisdictions and met with individual jurisdictions on projected household growth and to gather information on local land use. SCAG staff conducted further outreach to jurisdictions that did not provide an initial response to surveys. The iterative process was conducted over the course of two years.	SCAG staff conducted extensive outreach with all jurisdictions and met with them to survey for local input not only for the purpose of development accurate land use maps but also to resolve potential challenges. SCAG will continue to do so for the 6 th cycle RHNA process and encourages the participation of all jurisdictions.	Continue to conduct extensive outreach with all the jurisdictions and meet with them to solicit their input and review and ensure the accuracy of land use maps and resolving potential discrepancies. (Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
A9	RHNA	Provide a template for submittals and/or examples of submittals that meet SCAG expectations. (County of Ventura)	Although general guidelines were available, specific templates or examples were not published for the revision request or appeals processes. An appeal application that resulted in a granted appeal was provided to a jurisdiction on request.	SCAG staff will provide a sample packet as a guideline for revisions requests and appeals and will provide examples of past applications that resulted in a granted appeal during the preparation of the 6 th cycle RHNA.	In preparation of the 6th cycle RHNA beginning in 2018, SCAG staff will provide a sample packet as a guideline for revision requests and appeals along with examples of past applications that resulted in a granted appeal during the 5 th cycle RHNA update. Additionally, SCAG staff will continue to educate jurisdictions on the difference between revision requests and appeals. <i>(Recommendation made by Subcommittee on 05/29/14; affirmed by Subcommittee on 03/18/15).</i>
A10	RHNA	Direct communications to the Planning Department (or equivalent) or more specifically to the Planning Director or assigned point-of-contact for the RHNA process. (County of Ventura)	Public notices and other mass correspondence were provided via email or mail to Planning Directors, in addition to City Managers/County Administrators and other stakeholders.	SCAG has and will continue to address public notices and other mass correspondence via email or mail to Planning Directors, in addition to City Managers/County Administrators and other stakeholders.	Include in the Subcommittee’s overall recommendations a statement that SCAG staff will continue to notify planning directors, city managers, and other stakeholders of RHNA-related material and meetings, including having a designated point of contact similar to the local input communication protocol established for the 2016-2040 RTP/SCS process. The jurisdiction’s point of contact should be the same individual

					designated for the 2016 RTP/SCS to provide for historical reference and avoid discussion with two separate individuals; in addition, SCAG staff will have a process in place to confirm that the jurisdiction's contact is still there. <i>(Recommendation made by Subcommittee on 01/23/14; affirmed by Subcommittee on 03/18/15).</i>
A11	RHNA	Remove the "110% adjustment" component of the RHNA methodology, which will eventually result in a result in a realignment of affordable housing concentrations across the SCAG region and fails to comport with real estate market realities. (Calabasas)	Government Code Section 65584 (d)(4) states that the objectives of the RHNA is to allocate a lower proportion of housing need by income category to disproportionately affected communities, but does not specify a particular methodology to address the issue. The 110% adjustment toward the county distribution was adopted by the SCAG Regional Council as part of both the 4 th and 5 th cycle methodologies to address the state law requiring the allocation of a lower proportion of housing need by income category to disproportionately affected communities. For jurisdictions with a high concentration of low	Because the RHNA process allows for a COG to develop and adopt its own methodology to address disproportionately affected jurisdictions, staff recommends that this issue be revisited during the development of the 6 th RHNA cycle beginning in 2018. An overall approach should be folded into the future discussion of overarching principles for the 6 th cycle RHNA Plan. SCAG can survey adjustment methodologies from other COGs during the development of the 6 th RHNA cycle methodology to further inform the discussion.	Review different formulas and factors to determine the appropriate methodology to address the projected distribution of very-low and low income housing for overburdened communities during the development of the 6 th cycle RHNA, beginning in 2018. <i>(Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).</i>

			income households, a 110% adjustment toward the county distribution would result in a lower percentage of low income households compared to the county percentage. For jurisdictions with a low concentration of low income households, a 110% adjustment would result in a higher percentage of low income households compared to the county percentage.		
A12	RHNA	Ensure accuracy of the vacancy credit application. (Calabasas; Colton)	HCD granted a vacancy credit adjustment to its regional housing need determination to address the economic downturn. SCAG applied a vacancy credit to a number of jurisdictions based on its adopted 5 th cycle RHNA methodology and data from the 2010 U.S. Census.	SCAG staff recommends that this issue be revisited during the development of the 6 th RHNA cycle beginning in 2018 if the credit is granted by HCD again for the 6 th RHNA cycle. Any particular vacancy credit is dependent on market conditions at the time.	The accuracy of vacancy credit application will be addressed during the 6 th cycle RHNA process, beginning in 2018, if the credit is granted again for future cycles. <i>(Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).</i>

B) HCD Administrative Changes

The following are topics that may involve possible administrative changes by HCD and therefore, will require HCD’s approval for implementation. It is SCAG staff’s intent to coordinate and work with HCD staff on resolving these matters and have them participate in Subcommittee meetings when these topics are discussed. SCAG appreciates that HCD is committed to working with SCAG to maximize opportunities for RHNA and housing element administrative changes, and we look forward to continuing collaboration with HCD staff.

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Staff Proposal for Discussion with HCD	Recommendation by the RHNA and Housing Element Reform Subcommittee
B1	Housing Element	There should be a range of default densities established for jurisdictions to determine appropriate densities for affordable housing units. Circumstances such as mixed use projects should be considered. (Ontario; Ojai; Brea)	A jurisdiction can choose to use a default density instead of preparing its own analysis to determine unit affordability. Most jurisdictions in the SCAG region have a default density of 30 units per acre. Jurisdictions with less than 25,000 population or defined as “suburban” in state housing law have a default density of 20 units per acre.	<p>SCAG staff recommends that HCD consider a range for default density rather than a single number, which will provide flexibility for local jurisdictions.</p> <p>Staff also recommends working with HCD to establish a separate default density range for mixed-use projects.</p> <p>HCD Response: HCD is generally supportive but clarified that jurisdictions are not required to use the default density in housing elements and can instead provide an analysis of affordability. Potential change regarding optional default density would require legislative change.</p>	<p>SCAG staff will continue to facilitate discussion between HCD and jurisdictions to address default density options when determining appropriate sites for accommodating low and very-low income households. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i></p>

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Staff Proposal for Discussion with HCD	Recommendation by the RHNA and Housing Element Reform Subcommittee
B2	Housing Element	HCD should formalize the streamlining review policy that was applied during the 5 th cycle regarding existing housing needs data. The streamline review allowed for local jurisdictions to meet the existing housing needs data requirement in its housing element if they used data provided by the COG which was based on the existing housing needs data listing as described in state housing law and pre-approved by HCD. (SCAG staff)	As part of the streamlining review process for the 5 th housing element cycle, HCD pre-approved the use of SCAG’s existing housing need data set, which meets existing housing need data requirements in the preparation of local housing element updates. SCAG voluntarily made this data available on-line for local jurisdictions in a user friendly and interactive format.	<p>HCD should consider formalizing the streamlining review policy for existing housing needs data used in the 5th cycle that allowed COGs such as SCAG to develop pre-approved data sets for use by jurisdictions in developing their local housing element update.</p> <p>HCD response: HCD is in support of providing more efficient element update and review methods. Stakeholder input will be sought in formalizing policy. Housing advocates have expressed some concerns with streamline reviews and shorter timeframes to comment to jurisdiction and HCD. More time is needed for HCD and stakeholders to evaluate streamline results and jurisdiction element implementation and compliance issues. Some discussions may get underway around mid-2014.</p>	<p>Recommend that HCD consider formalizing the streamlining review policy for existing housing needs data (similar to the process used after completion the 5th cycle RHNA) that allowed COGs such as SCAG to develop pre-approved data sets for use by jurisdictions in development the existing housing needs portion of the local housing element update.</p> <p><i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i></p>

B3	RHNA	Projected growth from Tribal lands should be excluded from jurisdictional RHNA allocation. (Coachella Valley Association of Governments)	The 4 th RHNA cycle regional allocation included growth on Indian Tribal lands; the 5 th RHNA cycle regional allocation excluded growth on Tribal lands, per determination by HCD.	<p>Tribal lands are sovereign nations and jurisdictions do not have land use authority over Tribal lands. Accommodation or exclusion of future housing need generated by Tribal lands is not currently specified in state housing law and is subject to HCD determination. A formal HCD policy specifying exclusion of projected growth on Tribal Lands is recommended.</p> <p>HCD response: HCD agreed with the assessment that Tribal lands are sovereign nations and that jurisdictions do not have land use authority over those lands. HCD expressed general agreement with the staff recommendation..</p>	Continue dialogue and seek official confirmation with HCD on the issue of exclusion of Tribal land growth from regional RHNA allocations. <i>(Recommendation made by Subcommittee on 01/23/14; affirmed by Subcommittee on 03/18/15).</i>
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Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Staff Proposal for Discussion with HCD	Recommendation by the RHNA and Housing Element Reform Subcommittee
B4	RHNA	The 3% allowable difference between the DOF and COG population projection during the HCD and COG consultation process should be applied to the total population rather than the growth. (SCAG staff)	State housing law does not define whether the 3% allowable difference between the COG regional projection forecast and DOF projection applies to growth or total.	<p>SCAG staff continues to apply the 3% allowable difference to the total population rather than to the growth.</p> <p>HCD response: HCD agreed with SCAG staff assessment that a single threshold would be adequate and noted that a technical amendment could potentially be included in 2014 legislation.</p>	Continue dialogue and collaborate with HCD and staff of the appropriate committee of the State Legislature to include in a future Omnibus Bill a technical correction to the existing RHNA law with respect to regional population growth. SCAG recommends that the 3% allowable difference in population projections during the regional determination process be applied only to the total population. <i>(Recommendation made by</i>

					Subcommittee on 01/23/14; affirmed as amended by Subcommittee on 03/18/15).
B5	RHNA	General Plan updates in progress should be considered during the local input process to SCAG as well as in the final RHNA determination. (Oxnard)	SCAG continued to accept local input from jurisdictions on projected household growth until the adoption of the final RHNA Methodology. The 5 th cycle RHNA Methodology was adopted 11 months prior to the adoption of the Final RHNA allocation Plan.	A jurisdiction can coordinate a general plan update with the local input process for developing the SCAG RHNA projections, but the RHNA process must have a determined cutoff date for local input in order to consistently apply the final RHNA Methodology to the draft RHNA allocation for all jurisdictions. SCAG staff will facilitate a discussion by the Subcommittee regarding the timeline for submission of local data.	Ensure that jurisdictions are aware of data submission timelines during the development of the 6 th cycle RHNA so that circumstances such as general plan updates are incorporated into local input as needed. (Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).
B6	RHNA	The term “change in circumstance” should be defined so as to better understand this as a basis for an appeal to the draft RHNA allocation. (SCAG staff)	State housing law does not provide a definition of what situation or challenge would qualify as a “change in circumstance.”	SCAG staff proposes that affected jurisdictions work with COGs in a bottom-up process to develop proposed examples of the term “change in circumstance” and engage HCD in providing a clear definition and examples of the term. HCD response: HCD expressed interest in working with COGs and local jurisdictions in developing a survey to develop examples on what would constitute a change in circumstance and how housing demand could potentially be impacted.	SCAG staff will share the information obtained from recent survey on “significant and unforeseen change in circumstances” affecting a jurisdiction’s draft RHNA allocation with the HCD and other MPOs so that HCD may in turn develop possible guidance on the matter. (Recommendation made by Subcommittee on 05/29/14; affirmed as amended by Subcommittee on 03/18/15).

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Staff Proposal for Discussion with HCD	Recommendation by the RHNA and Housing Element Reform Subcommittee
B7	Housing Element	There should be state funding for the development of RHNA and housing elements since they are statewide mandates for jurisdictions. (Oxnard)	No specific state funding is available for jurisdictions to update local housing elements.	State law provides that SCAG can set fees for the development of the RHNA. SCAG charges its non-member jurisdictions to develop RHNA, but does not charge member jurisdictions given that SCAG’s work on RHNA development is funded primarily through the SCAG General Fund which is comprised largely of SCAG member dues. For housing element related costs, SCAG recommends that direct funding to jurisdictions from the state be discussed by the Subcommittee.	SCAG staff will continue the dialogue with HCD and other State agencies to find opportunities for State-level funding for jurisdictions to assist in the development of housing elements. Moreover, SCAG will continue to assist its local jurisdictions to obtain Cap-and-Trade funding to support Sustainable Communities Strategy (SCS) implementation, including planning for and supplying affordable housing. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
B8	Housing Element	The housing element zoning implementation timeframe is unrealistic and there should be a hardship process for more time with demonstrated progress. (Oxnard)	Zoning changes corresponding to housing element updates must be completed in a specific time frame, (generally three years after a housing element is adopted).	Staff will relay individual concerns regarding the zoning implementation timeframe to HCD. HCD response: Changes regarding zoning implementation timeframes and extensions cannot be addressed administratively and would require legislative change.	SCAG staff will continue to provide information to jurisdictions on the RHNA process and housing element update timelines and facilitate discussion with HCD for jurisdictions that need additional time for housing element implementation. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
B9	RHNA/Housing Element	Reflect the percentage requirements within an inclusionary ordinance as a credit to reduce the RHNA allocation for a jurisdiction or count them as units satisfying	Currently SCAG does not apply a RHNA allocation credit to jurisdictions with inclusionary zoning ordinances. Jurisdictions may apply inclusionary zoning ordinances	Jurisdictions may currently apply inclusionary zoning ordinances toward satisfying their RHNA need once a project is approved, permitted, or constructed. In regard to a RHNA allocation credit, the allocation represents planning for	Facilitate discussions as necessary with the HCD to ensure that inclusionary zoning ordinances can continue to be accounted for in updates of local housing elements to meet assigned RHNA allocation.

		the RHNA, whether or not the units are built. (Brea; County of Ventura)	towards their RHNA allocation in their respective housing element by either an analysis of appropriate zoning or a site analyses for pending, approved, permitted or constructed development.	future housing need while an inclusionary zoning ordinance is a requirement on the construction of housing units. Applying the credit during the development of the RHNA allocation places a high level of uncertainty since the application of inclusionary zoning is linked to specified zoning, development, and construction.	Continue to support that HCD allow for inclusionary zoning to be counted toward meeting a jurisdiction’s future housing needs in its housing element. <i>(Recommendations made by Subcommittee on 03/13/14 and 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
B10	Housing Element	Parcels zoned as mixed-use should count toward accommodation of the RHNA allocation. (Calabasas)	Jurisdictions may count planned units designated in mixed-use areas toward their RHNA allocation provided that they provide an analysis of unit affordability for the appropriate income group.	SCAG will continue working with HCD to ensure that units designated in mixed-use areas can be counted in housing elements toward meeting a jurisdiction’s RHNA allocation.	SCAG staff will continue to facilitate discussion between HCD and jurisdictions to address default density options when determining appropriate sites for accommodating low and very-low income households. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Staff Proposal for Discussion with HCD	Recommendation by the RHNA and Housing Element Reform Subcommittee
B11	Housing Element	Currently during housing element review, transitional and supportive housing is treated as typical single-family or multi-family housing. Transitional and supportive housing should be treated under the same requirements as a residential care facility, group home, or boarding home, since transitional/supportive	Government Code Section 65583(a)(5) requires that housing elements demonstrate that transitional housing and supportive housing are considered a residential use and subject to only those restrictions that apply to other residential dwellings of the same type in the same zone.	Transitional and supportive housing provide social and other services, often in institutional settings, similar to residential care facilities or boarding homes. Because they function differently from typical single- or multi-family housing units and often provide on-site social services, there may be justification for subjecting them to different requirements. SCAG staff will raise this topic with HCD.	SCAG staff recommends that State housing law remain unchanged in regard to transitional and supportive housing planning requirements, and for SCAG staff to facilitate discussions between HCD and jurisdictions in need of housing element assistance. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>

		housing does not necessarily function in the same way as other traditional residential uses, for example when social services are being provided on-site(Consultant)			
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C) Legislative Changes

The following are topics that may involve possible legislative proposals which, by their nature, will require input from various parties beyond HCD. Stakeholders include SCAG’s Legislative, Communications and Membership Committee (LCMC), HCD and other interested parties such as the League of California Cities, housing advocates, and other COGs/MPOs, as appropriate. Legislative changes require LCMC review before Regional Council action and require legislation sponsorship. It is SCAG staff’s intent to coordinate and work with HCD staff on resolving the following topics and have them participate in Subcommittee meetings when these matters are discussed. SCAG appreciates that HCD is committed to working with SCAG to maximize opportunities for RHNA and housing element administrative changes, and we look forward to the continuing collaboration with HCD staff in this regard. Legislative changes are the last resort if the identified challenges cannot be addressed through HCD administrative changes.

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
C1	RHNA	Consolidate the revision and appeal processes into one process. (Association of California Cities – Orange County)	The revision and appeal process timelines are described in state housing law as two separate processes.	Since the separate revision request and appeals processes allow a jurisdiction multiple avenues to request for a review of their respective draft RHNA allocation, it is likely in the best interests of local jurisdictions to keep as separate the revision request and appeals processes.	SCAG staff will continue to follow the separate revision request and appeal processes currently outlined in the state housing law. <i>(Recommendation made by Subcommittee on 05/29/14; affirmed by Subcommittee on 03/18/15).</i>
C2	Housing Element	The housing element development timeframe is unrealistic and there should be a hardship process for more time with demonstrated progress. (Oxnard; County of Riverside)	Housing element updates must be completed in a specific time frame, as outlined in state housing law (generally, 12 months after the COG’s adoption of the Final RHNA plan).	Regarding the housing element update timeframe, with the most recent streamlined review process made available by HCD, SCAG staff believes that the 12 month housing element update timeframe is workable.	SCAG staff will continue to provide information to jurisdictions on the RHNA process and housing element update timelines and facilitate discussion with HCD for jurisdictions that need additional time for housing element implementation. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>

C4	Housing Element	Cities with less than 25,000 should have more flexibility for the application of default densities in their housing elements than larger cities. (Ojai)	Cities with a population of less than 25,000 have lower default densities than larger cities. Most jurisdictions in the SCAG region have a default density of 30 units per acre. Jurisdictions with less than 25,000 population or defined as “suburban” in state housing law have a default density of 20 units per acre.	SCAG staff will facilitate a discussion with HCD to allow for a default density range when determining appropriate densities for accommodating low and very low income households. In addition, staff will seek for clarification regarding AB 745, which would allow local jurisdictions to request that council of governments adjust the default densities under state law if they are not consistent with local jurisdiction’s existing density.	SCAG staff will continue to facilitate discussion between HCD and jurisdictions to address default density options when determining appropriate sites for accommodating low and very-low income households. <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
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Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
C5	Housing Element	Allow cities with a population of under 100,000 within the Counties of San Bernardino and Riverside to be considered “suburban” for purposes of	Cities with a population of less than 25,000 have lower default densities than larger cities. Most jurisdictions in the SCAG region have a default density of 30 units per	SCAG staff will facilitate a discussion with HCD for potential legislative change to specify a default density range when determining appropriate densities for accommodating low and very low income households.	SCAG staff will continue to facilitate discussion between HCD and jurisdictions to address default density options when determining appropriate sites for accommodating low and very-low income households. <i>(Recommendation made by Subcommittee on 09/29/14;</i>

		default density. (Colton)	acre. Jurisdictions with less than 25,000 population or defined as “suburban” in state housing law have a default density of 20 units per acre.		affirmed by Subcommittee on 03/18/15).
C6	Housing Element	When reviewing the housing element of smaller jurisdictions, HCD should consider compatibility of the proposed zoning and planning with community design regarding building height, view protection, and development density unique to smaller jurisdictions. Affordable overlays and inclusionary programs should be the preference of HCD. (Ojai; Oxnard)	State housing law does not take into account housing compatibility in a housing element with community design regarding building height, view protection, and development intensity.	Legislative change would be necessary to specify a range of default densities for different types of uses and other considerations indicated in a housing element regarding compatibility with surrounding uses. A discussion could occur between HCD and the Subcommittee regarding community design in housing element review. HCD allows affordable housing overlays to be developed. State law requires analysis of all development standards for potential constraints to residential development regardless of density.	SCAG staff will facilitate discussion between HCD and jurisdictions regarding community design in housing element review and to continue to allow for jurisdictions to use tools such as inclusionary zoning and affordable housing overlays to meet their respective future housing need. (Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
C7	Housing Element	California Environmental Quality Act (CEQA) exemptions should be granted for infill projects that are designated to meet housing need in the housing element (San Clemente).	State law requires that projects not categorically exempt from CEQA must go through the CEQA review process. However, Senate Bill (SB) 226 (signed by the Governor October 2011) and SB 743 (September 2013) provide opportunities for CEQA exemption and streamlining. The purpose of SB 226 is to streamline the environmental review process for eligible infill projects, and is implemented through State CEQA Guideline Section 15183.3 (Streamlining for	<p>Local jurisdictions can currently avail themselves of CEQA streamlining provisions set forth through SB 226 (CEQA Guideline Section 15183.3). See http://opr.ca.gov/s_sb226.php</p> <p>Implementation of SB 743 by the State OPR is expected in 2014. For more information, see http://www.opr.ca.gov/s_transitorienteddevelopmentsb743.php</p> <p>SCAG staff has provided information on CEQA streamlining to our policy committees (of which the RHNA subcommittee are also members) and stakeholders, and will continue to do so as additional information becomes available.</p> <p>SCAG staff suggests that this topic continue to be discussed with SCAG committees and subcommittees as part of on-going CEQA modernization efforts.</p>	<p>SCAG will continue to provide information on CEQA streamlining to SCAG Policy Committees and stakeholders as additional information becomes available, and continue to discuss the topic as part of on-going CEQA modernization efforts.</p> <p><i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i></p>

			<p>Infill Projects). SB 743 provides opportunities for CEQA exemption and streamlining for projects meeting certain criteria relating to specific plans, infill and transit-oriented development. The State Office of Planning and Research (OPR) is currently working on implementation of SB 743.</p>		
C8	RHNA	<p>Clarify state housing law to specifically address how housing needs should be allocated to jurisdictions with a disproportionately high share of households in the low income categories (Colton)</p>	<p>Government Code Section 65584 (d)(4) states that the objectives of the RHNA is to allocate a lower proportion of housing need by income category to disproportionately affected communities, but does not specify a particular methodology to address the issue. The RHNA process allows a COG such as SCAG to adopt its own</p>	<p>Because SCAG can develop its own methodology to address disproportionately affected jurisdictions, staff recommends that this issue be revisited during the development of the 6th RHNA cycle in 2018. (See also Item No. A11).</p>	<p>Review different formulas and factors to determine the appropriate methodology to address the projected distribution of very-low and low income housing for overburdened communities during the development of the 6th cycle RHNA, beginning in 2018. <i>(Recommendation made by Subcommittee on 03/13/14; affirmed by Subcommittee on 03/18/15).</i></p>

			methodology, including how to address disproportionately affected communities. For the 5 th RHNA cycle, SCAG applied a “110% adjustment” to address this issue.		
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Local Sustainable Development and Looking Ahead

The following are topics that are related to RHNA and housing element reform but involve programs and policies outside of state housing law. These topics are included as part of the matrix so that they may be integrated into the overall discussion by the Subcommittee.

- Suggestions from the RHNA and Housing Element Reform Subcommittee
- Current SCAG Projects
 - Sustainability Grant Program/Call for Proposals
- CEQA Streamlining/SB226
- Legislation monitoring
 - CEQA Reform
- Grants
 - HCD NOFA notification
 - SCG

Item No.	RHNA or Housing Element Topic	Suggested Reform (by Third Party or SCAG staff)	Existing Policy/Procedure	Initial Staff Response/Recommendation	Recommendation by the RHNA and Housing Element Reform Subcommittee
D1	Housing Element	Funding opportunities and other preferences should be available to jurisdictions with compliant housing elements. (Ojai)	Jurisdictions with compliant 4 th cycle housing elements have access to 5 th cycle streamlined review and are prioritized for various	SCAG will coordinate with HCD in an effort to ensure that jurisdictions with compliant housing element will continue to receive streamlined review and funding opportunities as available.	SCAG will continue to coordinate with HCD in an effort to ensure that jurisdictions with compliant housing elements continue to receive streamlined review and funding

			available grants and funding.		opportunities as available. Moreover, SCAG will work with the State and our member jurisdictions and stakeholders as part of the State's Affordable Housing and Sustainable Communities (AHSC) program and identify additional funding opportunities for jurisdictions that build and preserve affordable housing. SCAG will also continue its efforts in facilitating between HCD and local jurisdictions to ensure housing element compliance. . <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
D2	Housing Element	Provide funding opportunities for all new very low and low income units built with affordable housing covenants, similar to the Parks-related housing grants provided under Proposition 1A. (Brea)	HCD currently provides funding for parks-related programs to jurisdictions that build very low and income units. No grants are currently available relating to affordable housing covenants.	SCAG will encourage the State to develop and identify more funding opportunities for jurisdictions that build and preserve affordable housing.	SCAG will continue to coordinate with HCD in an effort to ensure that jurisdictions with compliant housing elements continue to receive streamlined review and funding opportunities as available. Moreover, SCAG will work with the State and our member jurisdictions and stakeholders as part of the State's Affordable Housing and Sustainable Communities (AHSC) program and identify additional funding opportunities for jurisdictions that build and preserve affordable housing. SCAG will also continue its efforts in facilitating between HCD and local jurisdictions to ensure

					housing element compliance. . <i>(Recommendation made by Subcommittee on 09/29/14; affirmed by Subcommittee on 03/18/15).</i>
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REPORT

DATE: March 18, 2015

TO: RHNA and Housing Element Reform Subcommittee

FROM: Ma’Ayn Johnson, Housing & Land Use Planner, 213-236-1975, johnson@scag.ca.gov

SUBJECT: Updated Unforeseen and Significant Change in Circumstance Survey Results

EXECUTIVE SUMMARY:

At its May 29, 2014 meeting, the RHNA and Housing Element Reform Subcommittee directed staff to conduct a survey of all jurisdictions to determine what might constitute an unforeseen and significant change of circumstance as a basis for appeal and when it might apply. SCAG staff presented initial survey results at the September 29, 2014 Subcommittee meeting and has updated the survey results, which is recommended to be included in the Subcommittee’s final recommendations to the Community, Economic & Human Development (CEHD) Policy Committee.

STRATEGIC PLAN:

This item supports SCAG’s Strategic Plan; Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; Objective a: Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans.

BACKGROUND:

At its May 29, 2014 meeting, the RHNA and Housing Element Reform Subcommittee discussed the RHNA revision request and appeals process and provided recommendations to address reform. One of the topics of reform discussed at the May 29, 2014 meeting concerned the term “unforeseen and significant change in circumstances,” which is also known simply as “change in circumstances,” that can be used as a basis for filing an appeal on a jurisdiction’s draft RHNA allocation. According to State housing law, a jurisdiction can file an appeal of its draft RHNA allocation based on the adopted RHNA methodology, a local planning factor identified in Government Code Section 65584.04(d) (also known as “AB 2158 planning factors”), and an unforeseen and significant change in circumstances.

Out of the 13 appeals filed during the 5th RHNA cycle, six (6) of them included “significant and unforeseen change in circumstance” as a basis for appeal. Currently there is no clear definition of such circumstances in either State housing law or the Appeals Procedures adopted by the SCAG Regional Council for the 4th and 5th RHNA cycles. Further, there is no requirement or guidance on when it would need to occur in the RHNA process. Government Code Section 65584.05(d)(1) states only that a jurisdiction may appeal its draft allocation on the grounds that “a significant and unforeseen change in circumstances” has occurred in the local jurisdiction that merits a revision of the information submitted by the jurisdiction during the development of the RHNA methodology.

For both the 4th and 5th cycles, the RHNA Appeals Board did not find the arguments provided by jurisdictions compelling enough to grant the appeals requests based on significant and unforeseen change of circumstances. At the October 23, 2013 Subcommittee meeting, Mr. Glen Campora, Deputy Director at the

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California Department of Housing and Community Development (HCD), indicated that such change in circumstance must be related to land use planning.

Due to the lack of a concrete definition or successful examples of appeals based on a change in circumstance, the Subcommittee directed staff at its May 29, 2014 meeting to conduct a survey of all SCAG jurisdictions to determine what could constitute a change of circumstance and when would the change of circumstance have to occur to be eligible for an appeal basis. The survey was sent by email on July 31, 2014 to all SCAG city and county managers and planning directors with a submittal due date of August 22, 2014. SCAG staff sent a follow up email to subregional coordinators on September 16, 2014 in an effort to gather additional survey responses. Staff presented the initial survey results at the September 29, 2014 Subcommittee meeting as an informational item and continued to receive survey results until November 17, 2014. A total of fifty-seven (57) total responses to survey questions were submitted. Below are the final results of the survey.

The survey consisted of four (4) brief questions and a copy of the full survey is attached to this staff report (attachment 1). The following is a summary of the survey questions and the responses received. The full list of answers is attached to this staff report (attachment 2).

Question #1: What might constitute a “significant and unforeseen change in circumstances” that would affect a jurisdiction’s draft RHNA allocation? The circumstance must relate to land use planning.

There were fifty-three (53) individual responses to this question. Responses included “local planning constraints, annexation of county land, dissolution of redevelopment funding, and land use changes outside the jurisdiction’s control.”

Annexation of residentially-developed land from a county or incorporation of a city was included as responses. Annexations and incorporations involve boundary changes that would affect RHNA methodology and SCAG would need to be notified of any changes to jurisdictional boundaries so that the methodology could be amended until its final adoption. Typically annexations involving residentially zoned areas increase the number of households for the annexing city and would presumably add to its projected household growth and therefore RHNA allocation. The converse would apply for the involved county by reducing the number of households. However, annexations and incorporations typically involve well-developed sphere of influence plans and must undergo a rigorous process for final approval by the Local Agency Formation Commission (LAFCO).

The dissolution of redevelopment agencies has impacted building affordable housing throughout the State by increasing the need to find reliable and permanent funding sources to develop affordable housing. However, at the February 2, 2012 Community, Economic & Human Development (CEHD) Committee, Mr. Glen Campora, Deputy Assistant Director at HCD, indicated that the dissolution of redevelopment funds does not impact future housing need, represented by the RHNA allocation, since the funding was directed at increasing the supply of housing to meet that need. Additionally, the next RHNA cycle is anticipated to begin development in 2018, six (6) years after redevelopment dissolution, and would not be an unforeseen and significant change in circumstances at that point in time.

There were a variety of responses that indicated as being beyond a jurisdiction’s control. These include natural disasters, court orders, new identification of a health or public safety hazard, or acquisition of land

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by the state or federal government. Depending on the circumstances and how it affects households and housing demand, these issues might have merit as a basis for appeal in change in circumstance.

Question #2: START DATE: When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation?

Please select the earliest START date for the period of “change in circumstance” to apply (Please choose one):

- a) Between the local planning factor survey and RHNA Methodology adoption
- b) At the RHNA Methodology adoption
- c) At the Draft RHNA allocation distribution
- d) At the RHNA Appeals filing deadline
- e) At the RHNA Appeals hearings
- f) At the Final RHNA adoption
- g) Other (please explain)

For reference, survey users were provided a timeline of the 5th RHNA cycles process:

Submission of the local planning factor survey: July 2011
RHNA Methodology adoption: November 2011
Draft RHNA Allocation distribution: February 2012
RHNA Appeals filing deadline: May 2012
RHNA Appeals hearings: July 2012
Final RHNA adoption: October 2012

Sixteen (16) responses selected as the earliest start date for a change in circumstances appeal basis to apply (c) At the Draft RHNA allocation distribution. Thirteen (13) responses selected (a) Between the local planning factor survey and RHNA Methodology adoption. Eleven (11) responses selected (g) Other (please explain), and included answers such as at any time during the RHNA timeline and 12 months prior to the local planning factor survey (the full list of answers submitted as “Other” is included in attachment 3).

Question #3: END DATE: When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation?

Please select the latest END date for the period of “change in circumstance” to apply (Please choose one):

- a) Between the local planning factor survey and the RHNA Methodology adoption
- b) At the RHNA Methodology adoption
- c) At the Draft RHNA allocation distribution
- d) At the RHNA Appeals filing deadline
- e) At the RHNA Appeals hearings
- f) At the Final RHNA adoption
- g) Other (please explain)

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The top answer to question #3 was (f) At the Final RHNA adoption, with eighteen (18) survey users selecting this milestone as the latest end date. Fourteen (14) users responded with (g) Other, with some indicating again that change in circumstance as an appeal basis should apply at any time during the RHNA process while others indicated that it should occur during the housing element process (the full list of answers submitted as “Other” is included in attachment 3). Eleven (11) users indicated that the latest end date should be (d) At the RHNA Appeals filing deadline.

Question #4: Should the law be changed to allow for an adjustment to a RHNA allocation as part of the Housing Element process due to a significant and unforeseen change in circumstances occurring after the Final RHNA has been distributed?

- a) Yes
- b) No

Forty-five (45) out of the fifty-seven (57) responses for question #4 answered yes to changing the law to allow for an adjustment to a RHNA allocation as part of the housing element process due to a significant and unforeseen change in circumstance after the Final RHNA has been distributed. Because State housing law does not provide procedures for revising the Final RHNA allocation beyond annexation or incorporation situations, a legislative change would be needed to amend a RHNA allocation for an unforeseen and significant change in circumstance. SCAG staff will facilitate a discussion between HCD and this Subcommittee to determine the feasibility of this change and how it would fold in to the RHNA and housing element process.

SCAG staff will share the survey results with other metropolitan planning organizations (MPOs) and HCD if it is included in the Subcommittee’s final recommendations and recommended and adopted by the Subcommittee, CEHD Policy Committee, and Regional Council. The survey results, along with all of the anticipated final recommendations on RHNA and housing element reform, will also be shared with the 6th cycle RHNA Subcommittee starting in 2018.

FISCAL IMPACT:

Expenditures related to staff and legal support for the RHNA and Housing Element Reform Subcommittee along with additional related direct costs (e.g., stipends, meals, mileage and parking) are included as part of the FY 14-15 General Fund Budget.

ATTACHMENTS:

1. Survey on Change in Circumstances, Originally Sent via Email on July 31, 2014
2. Summary of Responses to Question #1
3. Summary of “Other” Responses to Questions #2 and #3

Explanation

The RHNA Appeals process allows for jurisdictions to appeal their draft RHNA allocation on several bases. One of the bases for appeal is a "significant and unforeseen change in circumstances." (Government Code Section 65584.05(d)(1)). However, State law does not provide a specific definition of a significant and unforeseen change in circumstances and when it would have to occur to affect the jurisdiction's draft RHNA allocation and justify its appeal.

At the direction of the SCAG RHNA and Housing Element Reform Subcommittee, SCAG staff is surveying local jurisdictions on possible definitions of a "significant and unforeseen change of circumstances." Results of the survey will be shared with the California Department of Housing and Community Development (HCD), other MPOs, stakeholders, and the RHNA and Housing Element Reform Subcommittee for further guidance on the matter. We appreciate your time in completing this brief survey

Please submit your answers no later than **Monday, September 29, 2014**. Thank you.

***1. Name**

***2. Jurisdiction**

***3. Position**

- City/County Manager
- Planning Director/Manager
- Other (please specify)

1. What might constitute a “significant and unforeseen change in circumstances” that would affect a jurisdiction’s draft RHNA allocation? The circumstance must relate to land use planning.

2.

START DATE:When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation? While current State law does not specify when it would apply, for the 5th RHNA cycle, SCAG considered the period between the adoption of the RHNA Methodology and the distribution of the draft RHNA allocation as the applicable timeframe. For reference, the 5th RHNA cycle (2013-2021) timeline was as follows;

Submission of the local planning factor survey: July 2011

RHNA Methodology adoption: November 2011

Draft RHNA Allocation distribution: February 2012

RHNA Appeals filing deadline: May 2012

RHNA Appeals hearings: July 2012

Final RHNA adoption: October 2012

Please select the earliest START date for the period of “change in circumstance” to apply (Please choose one):

- Between the local planning factor survey and RHNA Methodology adoption
- At the RHNA Methodology adoption
- At the Draft RHNA allocation distribution
- At the RHNA Appeals filing deadline
- At the RHNA Appeals hearings
- At the Final RHNA adoption
- Other (please explain)

3.

END DATE: When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation? While current State law does not specify when it would apply, for the 5th RHNA cycle, SCAG considered the period between the adoption of the RHNA Methodology and the distribution of the draft RHNA allocation as the applicable timeframe. For reference, the 5th RHNA cycle (2013-2021) timeline was as follows;

Submission of the local planning factor survey: July 2011

RHNA Methodology adoption: November 2011

Draft RHNA Allocation distribution: February 2012

RHNA Appeals filing deadline: May 2012

RHNA Appeals hearings: July 2012

Final RHNA adoption: October 2012

Please select the latest END date for the period of “change in circumstance” to apply (Please choose one):

- Between the local planning factor survey and the RHNA Methodology adoption
- At the RHNA Methodology adoption
- At the Draft RHNA allocation distribution
- At the RHNA Appeals filing deadline
- At the RHNA Appeals hearings
- At the Final RHNA adoption
- Other (please explain)

4. Should the law be changed to allow for an adjustment to a RHNA allocation as part of the Housing Element process due to a significant and unforeseen change in circumstances occurring after the Final RHNA has been distributed?

- Yes
- No

RHNA Change in Circumstance Survey
Summary of Question #1 Responses

1. What might constitute a “significant and unforeseen change in circumstances” that would affect a jurisdiction’s draft RHNA allocation? The circumstance must relate to land use planning.

- Annexation/incorporation
- Change in land use beyond jurisdiction’s control
- Economic changes
- Newly identified endangered species
- Drought
- Physical limitations
- Objections of residents
- Sewer capacity
- Misapplication of data used in methodology
- Miscalculation of housing need due to methodology application
- Natural disaster
- Delay in proposed transit station
- Need for infrastructure improvements
- Dissolution of redevelopment
- Legislation changes
- Lack of suitable land for development
- Unemployment
- Geological or other hazards limiting housing sites
- Vacant land developed faster than anticipated
- Identification of seismically active land
- Relocation of large public facilities (eg airports)
- Large scale project approval entailing General Plan amendment
- Project cancellation
- Court orders
- Newly discovered public safety or health hazard
- External litigation
- Referendum for permanent open space
- Zone changes
- City bankruptcy
- Acquisition of land by state or federal government
- Loss of major employer
- Placement of territory by Tribal Government into Federal Trust Land
- General Plan Updates

RHNA Change in Circumstance Survey
Summary of Question #2 and #3 "Other" Responses

Question #2: START DATE: When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation?... Please select the earliest START date for the period of "change in circumstance" to apply.

(g) Other: Please Explain:

- 12 months prior to the Local planning factor survey
- an unforeseen circumstance is exactly that...it could occur before, during or after the RHNA process
- At any time regardless of RHNA timeline listed above.
- Between the local planning factor survey and the RHNA Appeals Filing deadline
- Change occurred over time. Voter approved assessment district for maintaining roads expired. State funding no longer available.
- It should be at any time during the RHNA process until the RHNA adoption hearing.
- Not anticipated N/A
- These "significant & unforeseen change in circumstances" should be considered throughout all steps of the RHNA process

Question #3: END DATE: When would the significant and unforeseen change in circumstances need to occur to justify an appeal to the draft RHNA allocation?... Please select the latest END date for the period of "change in circumstance" to apply.

(g) Other: Please Explain:

- Within 12 months prior to local planning factor survey
- What difference does it make there has never been a fair consideration of an appeal anyway
- Before, during, after. It can be at any time.
- No end in sight. City's general fund is less than \$3,000,000 and community needs are vast. There are only one or two lots large enough to build multifamily developments and those are hampered by steep terrain.
- It should be at any time during the RHNA process until the RHNA adoption hearing.
- Not anticipated N/A
- Upon the change occurring-could be up to an including the RHNA cycle
- Throughout all phases
- After the Final RHNA adoption numbers are distributed, staff should be given a period of 60 days or so to appeal the final adoption in case during that time, an unforeseen change in circumstance occurs.
- Unforeseen changes in circumstances should be appealable up housing element adoption/certification or, at a minimum to the date of the RHNA Appeal Hearing.
- Since it is a significant and unforeseen change in circumstance there should be a process to allow it even during the Housing Element process

REPORT

DATE: April 2, 2015

TO: Regional Council (RC)
Community, Economic and Human Development Committee (CEHD)

FROM: Hasan Ikhata, Executive Director, (213) 236-1944, ikhata@scag.ca.gov

SUBJECT: Cap-and-Trade Greenhouse Gas Reduction Fund: Affordable Housing & Sustainable Communities (AHSC) Program/ SCAG Evaluation Criteria

EXECUTIVE DIRECTOR’S APPROVAL: 

RECOMMENDED ACTION FOR CEHD:

Recommend Regional Council approval of the Evaluation Criteria to be applied by SCAG staff in evaluating full applications prepared for projects in the SCAG region for the AHSC Program.

RECOMMENDED ACTION FOR RC:

Approve Evaluation Criteria.

EXECUTIVE SUMMARY:

The Strategic Growth Council (SGC) invited a subset of concept applications for the Affordable Housing and Sustainable Communities (AHSC) grant statewide program to submit full applications. Only twelve (12) applicants out of the fifty (50) applicants from the SCAG region were invited to submit full applications. Statewide, these twelve applicants represent only eighteen percent (18%) of the applicants invited to submit full applications. Full applications are due to SGC on April 20, 2015. SCAG will submit recommendations to SGC by May 18, 2015 on the applications for final awards based on a set of evaluation criteria. Staff developed the Evaluation Criteria described below based on implementation strategies outlined in the 2012 Regional Transportation Plan/Sustainable Community Strategy (RTP/SCS) and the Sustainability Grant Program Call for Projects guidelines. Staff is requesting that the CEHD Committee and the RC approve the criteria and authorize staff to apply these Evaluation Criteria to the applications.

STRATEGIC PLAN:

This item supports SCAG’s Strategic Plan, Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; Objective a) Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans.

BACKGROUND:

Through the state budget process, Cap-and-Trade auction proceeds are appropriated from the Greenhouse Gas Reduction Fund (GGRF) to state agencies and programs. SCAG staff has been monitoring and regularly providing reports to the Regional Council on the programs supported by the auction proceeds derived from the AB 32 Cap-and-Trade Program.

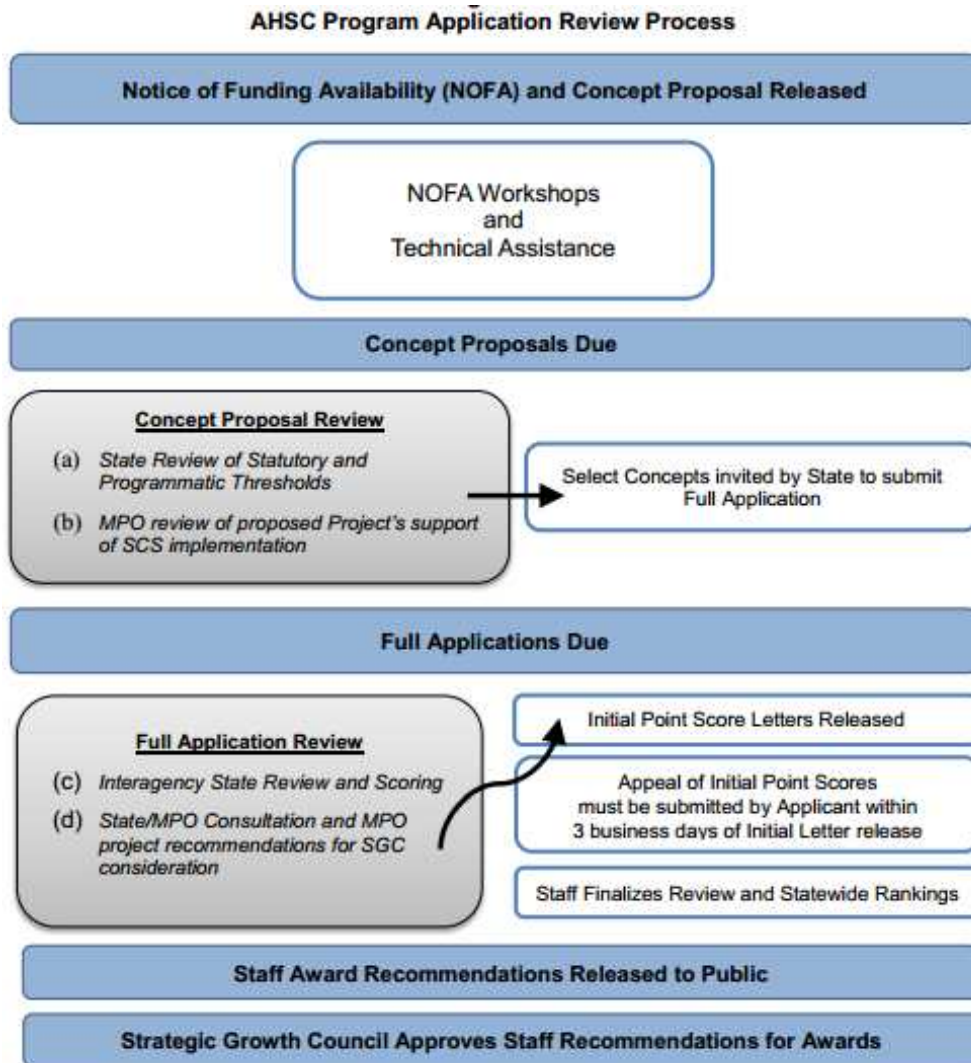


REPORT

The SGC is administering the AHSC Program, which is intended to further the regulatory purposes of AB 32 and SB 375 by investing GGRF monies in projects that reduce greenhouse gas emissions (GHGs) through more compact, infill development patterns, integrating affordable housing, encouraging active transportation and mass transit usage, and protecting agricultural land from sprawl development. Last month, the Regional Council and Policy Committees received a staff report on the MPO role in the application review process and an update on the concept applications from the SCAG region.

[SB 862](#) provides that the SGC “shall coordinate with the metropolitan planning organizations and other regional agencies to identify and recommend projects within their respective jurisdictions that best reflect the goals and objectives of this division.” Table 1 indicates the overall AHSC application review process and shows where in the process MPO coordination has taken and will take place.

Table 1



REPORT

Full Application Invitations

On March 18th, the SGC invited fifty four (54) statewide applicants to compete for \$120 million available funds. Only twenty-two (22%) of the projects invited to proceed for full grant applications are from the SCAG region, much lower than the region's population share (about 50%) and the region's share of disadvantaged communities (at 67%). Twelve (12) applicants out of the fifty (50) applicants submitted from the SCAG region were invited to submit full applications. Statewide, these twelve applicants represent only twenty-two percent (22%) of the applicants invited to submit full applications and only eighteen (18%) of the funds requested. See Attachment 2 for the list of projects invited for full application.

Full Application Technical Assistance

The SGC invited a subset of those who submitted concept applications to submit full applications on March 18, 2015. Full applications are due to SGC on April 20, 2015. SCAG staff has formed a Cap and Trade Assistance Team (CTAT) to provide technical assistance to full applicants within the SCAG region. Please contact Kristen Pawling, Associate Regional Planner, (pawling@scag.ca.gov) to request assistance.

Full Application Review Process

The SGC will provide to SCAG staff the full applications for review. SCAG staff has developed evaluation criteria that formulate recommendations for up to 150% of the region's population share of the \$120 million program amount available statewide. SCAG staff gathered input on the evaluation criteria at the Technical Working Group and CEOs Sustainability Working Group during March. If approved by the Regional Council, staff will submit the evaluation criteria to the SGC and will apply those criteria to the full applications submitted to SGC from the SCAG region. Based on the outcome of the evaluation criteria, staff will submit those recommendations to the SGC by May 18, 2015.

Evaluation Criteria

Pending RC approval, SCAG staff will use the set of evaluation criteria to review and rank proposed AHSC projects in Transit Oriented Development (TOD) project areas and Integrated Connectivity Project (ICP) project areas that have been selected for full application by the SGC. The criteria are based on the 2012 RTP/SCS strategies and the SCAG Sustainability Grant Program Call for Projects. The approved criteria will help staff identify competitiveness of the applications as to supporting the SCS implementation.

SCAG evaluation criteria use a three part approach considering greenhouse gas reduction quantification, co-benefits, and SCS implementation. Please see attachment for full criteria. The purpose of the evaluation criteria is to prioritize and recommend projects that meet the goal of reducing greenhouse gas emissions in consideration of the strategies outlined in the 2012 RTP/SCS, including co-benefits. If co-benefits and degree of SCS implementation cannot reasonably be quantified, staff is requesting authorization to utilize their best judgment in ranking projects with GHG reduction quantification as a principal guide.

Staff is seeking approval of the attached criteria and permission for staff to apply the criteria in order to develop final project recommendations.

REPORT

**Table 2
Key Milestones**

Full Application Phase	SGC invited subset of concept applicants to submit full applications	March 18
	CEO Sustainability Working Group/ Technical Working Group/other working groups	March 10 & 19
	SCAG evaluation criteria reviewed and approved by CEHD & RC	April 2
Final Awards Stage	Full Applications due to Strategic Growth Council	April 20
	SCAG evaluation and recommendations to SGC	May 18
	Application Recommendation Information to CEHD/RC	June 4
	AHSC awards announced	Late June

FISCAL IMPACT:

Work associated with this item is included in the current FY2014-15 Overall Work Program (15-020.SCG00161.04: Regulatory Compliance; 15-065.SCG00137: Sustainability Program; and 15-070.SCG00147: Modeling Application and Analysis)

ATTACHMENTS:

- SCAG 2015 AHSC Evaluation Criteria
- SCAG 2015 AHSC SGC Invited Applicants

**Southern California Association of Governments
2015 Affordable Housing & Sustainable Communities Grants (AHSC)
Evaluation Criteria**

SCAG staff will use these guidelines to review, score, and rank proposed AHSC projects in Transit Oriented Development (TOD) project areas and Integrated Connectivity Project (ICP) project areas that have been selected for full application by the Strategic Growth Council. The Strategic Growth Council is administering the AHSC program, which is one out of a number of programs related to the Greenhouse Gas Reduction Fund (GGRF). These evaluation criteria reflect SCAG's 2012-2035 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS) goals and strategies as well as the Sustainability Grant Program Call for Projects.

SCAG's recommendations are based on three overarching considerations: maximizing greenhouse gas (GHG) reduction, emphasizing co-benefits, and strong implementation of the 2012-2035 RTP/SCS. To the degree feasible, SCAG's review will consider the entirety of the project, not just the capital projects that are being funded through the AHSC. SCAG strongly supports applications benefitting disadvantaged communities.

Scoring:

Scoring is based on a point scale from 0 to 100. GHG reduction will comprise 50% of a project's score. Co-benefits and the implementation of the 2012-2035 RTP/SCS strategies will comprise 30% and 20% of a project's score, respectively.

Part One: GHG Reduction (50 Points)

- Project scoring will start with GHG reduction output (Metric tons of CO₂ over project life/Greenhouse Gas Reduction Fund Amount Requested (\$)), where figures are tabulated based on VMT reductions. SCAG will establish a reasonable range of scores based on GHG cost-benefit effectiveness. Projects will be ranked accordingly within this range. This helps to identify the cost effectiveness of a project in reducing GHG over the life of a project.

Part Two: RTP/SCS Co-Benefits (30 Points)

- Projects must clearly identify three co-benefits that support the goals of the RTP/SCS as measured in Table 5.1 of the Adopted 2012 RTP/SCS Outcomes and Performance Measures/Indicators and Table 2 of the [RTP/SCS Performance Measures Appendix](#). SCAG will review the co-benefits and assign a score based on how strongly the project adheres to and demonstrates the selected co-benefit. Applications are limited to a selection of three co-benefits, and scoring will be on a scale of 1 to 10 for each respective item. This sum will then be added to the score for Part One. Co-benefits must also adhere to the categories outlined in the AHSC Program Guidelines: public health and safety, economic, and environmental co-benefits.

Part Three: RTP/SCS Implementation Strategies (20 Points)

- Projects that clearly address bullets within the six categories named below through a narrative explanation will be scored higher. See Part three of Scoring Criteria

Categories:

Category 1: Integrated Planning

- Promotes residential, mixed- used, and/or employment development around current and planned transportation investments

Category 2: Land Use Mix

- Promotes a sustainable land use mix, including new housing.
- Encourages affordable housing and mixed land uses, which may include compact neighborhood serving centers.

Category 3: Advancing Green Region

- Addresses climate change through adaptation planning.
- Promotes energy and/or water efficiency and savings.

Category 4: Promotes Active Transportation & Public Health

- Promotes active transportation such as walking and bicycling.
- Promotes physical activity, safety, education, and outreach.
- Project is implementing a healthy community plan and/or active transportation (bicycle and/or pedestrian) plan.
- Promotes shift from automobiles to active transportation.

Category 5: Aligning Transportation Investments

- Project is aligned with existing or planned transportation investments within 5 miles of project area including any planned bicycle infrastructure, pedestrian improvements, transit, local rail, regional rail, bus rapid transit, and/or bus rapid transit light.
- Promotes linkages within existing active transportation and transit networks.
- Project includes first/last mile strategies or is part of an area with a first/last mile strategy plan actively in development.

Category 6: Sustaining Regional Goals

- Project is implementing a SCAG Sustainability Grant plan or a past Compass Blueprint Grant plan.
- Promotes the 3 E's of Sustainability: Economy, Equity, and Environment.
- Demonstrates innovative approaches to regional planning issues that can be replicated elsewhere, especially robust collaboration.

Final Recommendation Constraints:

These constraints will be applied to the project recommendations following staff application of the above outlined three-part scoring.

- SCAG will recommend a minimum of fifty percent (50%) of project funds benefiting Disadvantaged Communities

- SCAG will recommend a minimum of forty percent (40%) TOD projects and a minimum of thirty percent (30%) ICP projects.
- SCAG will only recommend up to 200% of the maximum award amount per jurisdiction (\$30 million).
- SCAG will only recommend up to 150% of the regional population share (about \$90 million).

Affordable Housing & Sustainable Communities				
DRAFT Scoring Criteria				
No.	Category	Criteria	Points Possible	Score
Part One: GHG Reduction (50 Points Possible - 50% of Overall Score)				50
1A	Overall Cost Effectiveness	Metric Tons of CO2 Over Project Life/GGRF Requested (\$)	No Points	
1B		1A, ranked against other applicants' 1A score. SCAG will establish a reasonable range of scores out of 50 based on GHG reduction cost-benefit. Projects will be ranked accordingly and assigned scores within that range	50	
Part Two: RTP/SCS Co-Benefits (30 Points Possible - 30% of Overall Score)				30
2A	Co-Benefit A	Co-benefit fully relate to RTP/SCS goals (Table 5.1 or Performance Measure Appendix Table 2)	10	
2B	Co-Benefit B	Co-benefit fully relate to RTP/SCS goals (Table 5.1 or Performance Measure Appendix Table 2)	10	
2C	Co-Benefit C	Co-benefit fully relate to RTP/SCS goals (Table 5.1 or Performance Measure Appendix Table 2)	10	
Part Three: RTP/SCS Implementation Strategies (20 Points Possible - 20% of Overall Score)				20
3A	Integrated Planning	Promotes residential, mixed- used, and/or employment development around current or planned transportation investments	5	
3B	Land Use Mix	Promotes a sustainable land use mix, including new housing	1	
3C		Encourages affordable housing and mixed land uses, which may include compact neighborhood serving centers	1	
3E	Advancing Green Region	Addresses climate change through adaptation planning	1	
3F		Promotes energy and/or water efficiency and savings	1	
3G	Promotes Active Transportation & Public Health	Promotes active transportation, such as walking and bicycling	1	
3H		Promotes physical activity, safety, education, and outreach	1	
3I		Project is implementing a healthy communities plan and/or active transportation (bicycle and/or pedestrian) plan	1	
3J		Promotes shift from automobiles to active transportation	1	
3K	Aligning Transportation Investments	Project is aligned with existing or planned transportation investments within 5 miles of project area (abbreviated, see full criteria)	1	
3L		Promotes linkages within existing active transportation and transit networks	1	
3M		Project includes first/last mile strategies or is part of an area with a first/last mile strategy actively in development	1	
3N	Sustaining Regional Goals	Project is implementing a SCAG Sustainability Grant or past SCAG Compass Blueprint Grant plan	2	
3O		Promotes the 3E's of Sustainability: Economy, Equity, & Environment	1	
3P		Demonstrates innovative approaches to regional planning issues that can be replicated elsewhere, especially robust collaboration.	1	
Total Project Score				0

SCAG 2015 Affordable Housing & Sustainable Communities Applicants

Applicant	Project Name	County	Funding Requested
American Communities, LLC	Crenshaw Villas	Los Angeles	\$2,200,000
Century Housing Corporation	Anchor Place	Los Angeles	\$2,441,616
C&C Development, LLC	Depot at Santiago	Orange	\$6,352,699
META Housing Corporation	Sylmar Court Apartments	Los Angeles	\$2,500,000
East LA Community Corporation	1 st & Soto TOD Apartments Phase 2	Los Angeles	\$4,072,843
META Housing Corporation	127 th Street Apartments	Los Angeles	\$1,500,000
META Housing Corporation	Gundry Hill Apartments	Los Angeles	\$2,500,000
Coachella Valley Housing Coalition	March Veterans Village	Riverside	\$7,885,736
McCormack Baron Salazar	MacArthur Park Apartments Phase B	Los Angeles	\$7,014,560
META Housing Corporation	El Segundo Family Apartments	Los Angeles	\$1,900,000
BRIDGE Housing Corporation	Jordan Downs—Phase 1	Los Angeles	\$6,500,000
Corporate Fund for Housing	Mosaic Gardens at Westlake	Los Angeles	\$8,000,000
Total			\$52,867,454

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2015 MEETING SCHEDULE

REGIONAL COUNCIL AND POLICY COMMITTEES

Main Office

818 West Seventh Street
12th Floor
Los Angeles, California
90017-3435
t (213) 236-1800
f (213) 236-1825
www.scag.ca.gov

All Regular Meetings are scheduled on the 1st Thursday of each month; except for the month of October*	
Executive/Administration Committee (EAC)	9:00 AM – 10:00 AM
Community, Economic and Human Development Committee (CEHD)	10:00 AM – 12:00 PM
Energy and Environment Committee (EEC)	10:00 AM – 12:00 PM
Transportation Committee (TC)	10:00 AM – 12:00 PM
Regional Council (RC)	12:15 PM – 2:00 PM

Officers

President
Carl Morehouse, San Buenaventura

First Vice President
Cheryl Viegas-Walker, El Centro

Second Vice President
Michele Martinez, Santa Ana

Immediate Past President
Greg Pettis, Cathedral City

Executive/Administration Committee Chair

Carl Morehouse, San Buenaventura

Policy Committee Chairs

Community, Economic and Human Development
Margaret Finlay, Duarte

Energy & Environment
Deborah Robertson, Rialto

Transportation
Alan Wapner, San Bernardino Associated Governments

January 1, 2015 (DARK)

February 5, 2015

March 5, 2015

April 2, 2015

May 7 – 8, 2015

(2015 SCAG Regional Conference & General Assembly)

June 4, 2015

July 2, 2015

August 6, 2015 **(DARK)**

September 3, 2015

October 8, 2015*

(Note: League of California Cities Annual Conference, San Jose, CA, on Sept. 30 – Oct. 2)

November 5, 2015

December 3, 2015

The Regional Council consists of 86 elected officials representing 191 cities, six counties, six County Transportation Commissions, one representative from the Transportation Corridor Agencies, one Tribal Government representative and one representative for the Air Districts within Southern California.


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DATE: April 2, 2015

TO: Regional Council (RC)
Executive/Administration Committee (EAC)
Community, Economic, and Human Development (CEHD) Committee
Energy and Environment Committee (EEC)
Transportation Committee (TC)

FROM: Huasha Liu, Director of Land Use and Environmental Planning, liu@scag.ca.gov,
213-236-1838

SUBJECT: SCAG Sustainability Planning Grants Program – Monthly Update

EXECUTIVE DIRECTOR'S APPROVAL: 

RECOMMENDED ACTION:
Receive and File.

EXECUTIVE SUMMARY:

SCAG is providing the attached monthly update regarding successful implementation of seventy-five (75) Sustainability Grants to member agencies. Forty-four (44) of the seventy-five (75) approved SCAG Sustainability Planning Grants were funded in the fall of 2013. An additional fifteen (15) projects were funded in the summer of 2014. Six (6) of these projects will be funded by an award to SCAG from the California Strategic Growth Council. The remaining projects were funded in the fall of 2014. At the time this report was distributed, seventy (70) grant projects have had Scopes of Work developed and finalized, sixty-six (66) grant projects have had Request for Proposals (RFPs) released, fifty-eight (58) grant projects have selected consultants, and forty-eight (48) grant projects have had contracts executed (this includes contracts resulting from Memoranda of Understanding between SCAG and the following Cities and funding contributions: West Covina - \$200,000; Indio - \$175,000; Westminster - \$200,000; and Fountain Valley - \$200,000. These funding contributions are consistent with the Sustainability Grant amount the Regional Council previously authorized).

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; and Goal 4: Develop, Maintain and Promote the Utilization of State of the Art Models, Information Systems and Communication Technologies.

BACKGROUND:

On September 12, 2013, the Regional Council approved seventy-three (73) Sustainability Planning Grant projects and directed staff to proceed with funding projects with available funds for Phases I and Phase II projects (total of 44 projects). The remaining projects comprised Phase III and are proceeding as additional funds have become available in FY 2014-2015. An additional fifteen (15) projects were funded in the summer of 2014. On August 7, 2014 the Regional Council approved adding two (2) Sustainability Planning

REPORT

Grant projects to the approved list for a new total of seventy-five (75) projects. On October 2, 2014 the Regional Council approved funding for the remaining projects on the list.

SCAG staff is providing monthly updates to the Board regarding implementation of the seventy-five (75) grants. At the time this report was distributed, seventy (70) grant projects have had Scopes of Work developed and finalized, sixty-six (66) grant projects have had Request for Proposals (RFPs) released, fifty-eight (58) grant projects have selected consultants, and forty-eight (48) grant projects have had contracts executed (this includes contracts resulting from Memoranda of Understanding between SCAG and the following Cities and funding contributions: West Covina - \$200,000; Indio - \$175,000; Westminster - \$200,000; and Fountain Valley - \$200,000. These funding contributions are consistent with the Sustainability Grant amount the Regional Council previously authorized).

FISCAL IMPACT:

Funding is included in SCAG's FY 2014-15 Overall Work Program (OWP) Budget. Staff's work budget for the current fiscal year are included in FY 2014-15 OWP 065.SCG02663.02.

ATTACHMENT:

Summary Progress Chart

SCAG Sustainability Planning Grants

March 12, 2015

Regional Council Progress Update

Rank	Applicant	Project	Working /				
			Last Contact	Scope	RFP	Selection	Contract
Phase 1 (Available funds FY 13-14)							
1	San Bernardino County	Bloomington Area Valley Blvd. Specific Plan Health and Wellness Element - Public health; Active transportation; Livability; Open space	x	x	x	x	x
2	Los Angeles - Department of City Planning	Van Nuys & Boyle Heights Modified Parking Requirements - Economic development; TOD; Livability	x	x	x	x	x
3	Los Angeles - Department of City Planning	Bicycle Plan Performance Evaluation - Active transportation; performance measures	x	x	x	x	x
4	Western Riverside Council of Governments	Public Health: Implementing the Sustainability Framework - Public health; Multi-jurisdiction coordination; Sustainability	x	x	x	x	x
5	Santa Ana	Complete Streets Plan - Complete streets; Active transportation; Livability	x	x	x	x	x
6	San Bernardino Associated Governments	Climate Action Plan Implementation Tools - GHG reduction; Multi-jurisdiction coordination; Implementation	x	x	x	x	x
7	Riverside	Restorative Growthprint Riverside - GHG reduction; Infrastructure investment; Economic development	x	x	x	x	x
8	Orange County Parks	Orange County Bicycle Loop - Active transportation; Multi-jurisdictional; Public health	x	x	x	x	x
9	Ventura County	Connecting Newbury Park - Multi-Use Pathway Plan - Active transportation; Public health; Adaptive re-use	x	x	x	x	x
10	Imperial County Transportation Commission	Safe Routes to School Plan - Multi-modal; Active transportation	x	x	x	x	x
11	Yucaipa	College Village/Greater Dunlap Neighborhood Sustainable Community - Complete Streets; TOD	x	x	x	x	x

Rank	Applicant	Project	Working /				
			Last Contact	Scope	RFP	Selection	Contract
12	Las Virgenes-Malibu Council of Governments	Multi-Jurisdictional Regional Bicycle Master Plan - Active transportation; Public health; Adaptive re-use	x	x	x	x	x
13	Eastvale	Bicycle & Pedestrian Master Plan - Active Transportation	x	x	x	x	x
14	West Covina	Downtown Central Business District - Multi-modal; Active transportation	x	x	x	x	x
15	Placentia	General Plan/Sustainability Element & Development Code Assistance - General Plan Update; Sustainability Plan	x	x	x	x	x
16	Paramount/Bellflower	Regional Bicycle Connectivity - West Santa Ana Branch Corridor - Active transportation; multi-jurisdiction	x	x	x	x	x
17	Costa Mesa	Implementation Plan for Multi-Purpose Trails - Active Transportation	x	x	x	x	x
Phase 2 (Available funds)							
18	Fullerton	East Wilshire Avenue Bicycle Boulevard - Active transportation; Livability; Demonstration project	x	x	x	x	x
19	Beaumont	Climate Action Plan - GHG reduction	x	x	x	x	x
20	Palm Springs	Sustainability Master Plan Update - Leverages larger effort; commitment to implement	x	x	x	x	x
21	Big Bear Lake	Rathbun Corridor Sustainability Plan - Multi-modal; Economic development; Open space	x	x	x	x	x
22	Western Riverside Council of Governments	Land Use, Transportation, and Water Quality Planning Framework - Integrated planning, Sustainability	x	x	x	x	x
23	Anaheim	Bicycle Master Plan Update - Active transportation	x	x	x	x	x
24	Ontario	Ontario Airport Metro Center - Multi-modal; Visualization; Integrated planning	N/A				
25	Coachella Valley Association of Governments	CV Link Health Impact Assessment - Active transportation; Public health; Multi-jurisdiction	x	x	x	x	x

Rank	Applicant	Project	Working /				
			Last Contact	Scope	RFP	Selection	Contract
26	San Bernardino Associated Governments	San Bernardino Countywide Complete Streets Strategy - Multi-modal; Livability; Multi-jurisdiction	x	x	x	x	x
27	Chino Hills	Climate Action Plan and Implementation Strategy - GHG reduction; Implementation; Sustainability	x	x	x	x	x
28	Coachella	La Plaza East Urban Development Plan - Mixed-use, TOD, Infill	x	x	x	x	x
29	South Bay Bicycle Coalition/Hermosa, Manhattan, Redondo	Bicycle Mini-Corral Plan - Active transportation; implementable; good value	x	x	x	x	x
30	Hawthorne	Crenshaw Station Area Active Transportation Plan and Overlay Zone - Multi-modal; Active transportation; GHG reduction	x	x	x	x	x
31	Chino	Bicycle & Pedestrian Master Plan - Multi-modal; Active transportation	x	x	x	x	x
32	Stanton	Green Planning Academy - Innovative; Sustainability; Education & outreach	x	x	x	x	x
33	Hermosa Beach	Carbon Neutral Plan - GHG reduction; Sustainability	x	x	x	x	x
34	Palm Springs	Urban Forestry Initiative - Sustainability; Unique; Resource protection	x	x	x	x	x
35	Orange County	"From Orange to Green" - County of Orange Zoning Code Update - Sustainability; implementation	x	x	x	x	x
36	Calimesa	Wildwood and Calimesa Creek Trail Master Plan Study - Active transportation; Resource protection	x	x	x	x	x
37	Western Riverside Council of Governments	Climate Action Plan Implementation - GHG Reduction; Multi-jurisdiction; implementation	x	x	x	x	x
38	Lynwood	Safe and Healthy Community Element - Public health & safety, General Plan update	x	x	x	x	x

Rank	Applicant	Project	Working /				
			Last Contact	Scope	RFP	Selection	Contract
39	Palmdale	Avenue Q Feasibility Study - Mixed-use; Integrated planning	x	x	x	x	x
40	Long Beach	Willow Springs Wetland Habitat Creation Plan - Open Space; Resource protection	x	x	x	x	x
41	Indio	General Plan Sustainability and Mobility Elements - Sustainability; Multi-modal, General Plan update	x	x	x	x	x
42	Glendale	Space 134 - Open space/Freeway cap; Multi-modal	x	x	x	x	x
43	Rancho Palos Verdes/City of Los Angeles	Western Avenue Corridor Design Implementation Guidelines - Urban Infill; Mixed-use; Multi-modal	x	x	x	x	x
44	Moreno Valley	Nason Street Corridor Plan - Multi-modal; Economic development	x	x	x	x	x
Phase 3 (Pending additional funds)							
45	Park 101/City of Los Angeles	Park 101 District - Open space/Freeway cap; Multi-modal	x	x	x		
46	Los Angeles/San Fernando	Northeast San Fernando Valley Sustainability & Prosperity Strategy - Multi-jurisdiction; Economic development; Sustainability	x	x	x	x	
47	San Dimas	Downtown Specific Plan - Mixed use; Infill	x	x			
48	Los Angeles - Department of City Planning	CEQA Streamlining: Implementing the SCS Through New Incentives - CEQA streamlining	x	x	x		
49	Pico Rivera	Kruse Road Open Space Study - Open space; Active transportation	x	x	x	x	x
50	South Bay Cities Council of Governments	Neighborhood-Oriented Development Graphics - public outreach	x	x	x	x	
51	San Bernardino Associated Governments	Safe Routes to School Inventory - Active transportation; Public health	x	x	x	x	x
52	Burbank	Mixed-Use Development Standards - Mixed use; Urban infill	x	x	x	x	

Rank	Applicant	Project	Working / Last Contact	Scope	RFP	Selection	Contract
53	San Bernardino Associated Governments	Countywide Habitat Preservation/Conservation Framework - Open Space; Active Transportation	N/A				
54	Rancho Cucamonga	Healthy RC Sustainability Action Plan - Public health; implementation	x	x	x	x	
55	Pasadena	Form-Based Street Design Guidelines - Complete Streets; Multi-modal; Livability	x	x	x	x	
56	South Gate	Gateway District/Eco Rapid Transit Station Specific Plan - Land Use Design; Mixed Use; Active Transportation	x	x			
57	Lancaster	Complete Streets Master Plan - Complete Streets Plan	x	x	x	x	
58	Rancho Cucamonga	Feasibility Study for Relocation of Metrolink Station - Transit Access	x	x	x		
59	Santa Clarita	Soledad Canyon Road Corridor Plan - Land Use Design; Mixed Use Plan	N/A				
60	Seal Beach	Climate Action Plan - Climate Action Plan	x	x	x	x	
61	La Mirada	Industrial Area Specific Plan - Land Use Design	N/A				
62	Hemet	Downtown Hemet Specific Plan - Land Use Design; Mixed Use Plan	x	x	x	x	
63	Hollywood Central Park/City of Los Angeles	Hollywood Central Park EIR - Open Space/Freeway Cap; Multi-modal	x	x			
64	Desert Hot Springs	Bicycle/Pedestrian Beltway Planning Project - Active Transportation	N/A				
65	Cathedral City	General Plan Update - Sustainability - General Plan Update; Sustainability Plan	x	x	x	x	
66	Westminster	General Plan Update - Circulation Element - General Plan Update; Complete Streets	x	x	x	x	x
67	La Canada Flintridge	Climate Action Plan - Climate Action Plan	x	x	x		
68	Huntington Beach	Neighborhood Electric Vehicle Plan - Electric Vehicle	x	x	x		
69	Pasadena	Green House Gas (GHG) Emission Reduction Evaluation Protocol - Climate Action Plan	x	x	x	x	


		Working / Last						
Rank	Applicant	Project	Contact	Scope	RFP	Selection	Contract	
70	San Bernardino Associated Governments	Countywide Bicycle Route Mobile Application - Active Transportation	x	x				
71	Dana Point	General Plan Update - General Plan Update	x	x	x			
72	Garden Grove	RE:IMAGINE Downtown - Pedals & Feet - Active Transportation; Infill	x	x	x			
73	Barstow	Housing Element and Specific Plan Update - Housing; Land Use Design	x	x	x			
74	Bell	General Plan Update - General Plan Update	x	x	x	x		
75	Fountain Valley	Euclid/I-405 Overlay Zone - Mixed use; Urban infill	x	x	x	x	x	

DATE: April 2, 2015

TO: Community, Economic and Human Development Committee (CEHD)

FROM: Javier Aguilar; Senior Planner; Research, Analysis and Information Services; 213-236-1845; aguilar@scag.ca.gov

SUBJECT: Geographic Information System (GIS) Rollout: SCAG GIS Services Program

EXECUTIVE DIRECTOR'S APPROVAL: 

RECOMMENDED ACTION:
Receive and File.

EXECUTIVE SUMMARY:
Staff will inform the second round GIS Rollout to local jurisdictions—providing laptops, ArcGIS Software, data and GIS trainings to selected SCAG member jurisdictions—as part of SCAG’s GIS Services Program. Eligibility was established by the recipient jurisdictions’ resources, and their ability to benefit from the GIS rollout. Some 20 SCAG member jurisdictions will benefit from this round of GIS rollout.

STRATEGIC PLAN:
This item supports the following Strategic Plan Goal and Objective: Goal 4 (Develop, Maintain and Promote the Utilization of State of the Art Models, Information Systems and Communication Technologies). Objective C (Maintain a leadership role in the modeling and planning data/GIS communities).

BACKGROUND:
Since 2010, SCAG has implemented a GIS Services Program (“the Program”) in response to the needs from jurisdictions for more meaningful local input for and participation in the regional planning process. The objectives of the Program are to promote GIS technology, data sharing, data updating, and standardization of GIS data for improved local and regional planning.

The Program is free to SCAG member agencies. It involves SCAG staff assisting member agencies with GIS projects to “fill-in-the gaps” in these difficult fiscal times. To-date, individualized scopes of work for 91 jurisdictions have been executed, which covered GIS training, data sharing, data conversion, application development, and other services to meet each agency’s needs.

The tangible benefits to local jurisdictions include: (1) enabling more efficient operations in local jurisdictions’ day-to-day activities involving GIS and (2) providing over 200 participants with free customized GIS trainings, software, equipment, data, and other services, such that local jurisdictions can better leverage their resources and/or provide new services to their constituents.

SCAG is pleased to announce GIS Rollout to participating Program jurisdictions. The GIS rollout entails that selected jurisdictions and partners will receive a laptop, ArcGIS software, data, and GIS training (from SCAG staff). Nearly three (3) years ago, the SCAG GIS Services rollout distributed these resources to 22 jurisdictions and partners. Eligibility was established the by the recipients’ limit resources, and their ability to benefit from the GIS rollout.

REPORT

Due to limited resources, staff has also established criteria for this GIS rollout to determine the eligibility of the upcoming recipients.

1. Must be a SCAG member.
2. Must be a participant of SCAG GIS Services Program.
3. City and/or planning department does not have ArcGIS.
4. Consider jurisdictions' population size and/or income.
5. Agree to sign agreement with SCAG.
6. Must receive GIS training.
7. Must respond to a survey one year from the receipt of resources.
8. Must utilize equipment and software to update the city's general plan, existing land use, and zoning data."

As part of the Program, staff will implement a GIS Rollout, entailing a free laptop, ArcGIS software, data, and GIS training to over 20 jurisdictions. It aims to assist local jurisdictions to better leverage their resources and/or provide new services to their constituents.

Building on the current foundation, staff will further improve the Program through the following: (1) provide more GIS training and follow-up visits to participating members; (2) implement assistance programs for all counties in the region; (3) outreach to all jurisdictions about the Program;

In conclusion, SCAG staff is committed to collaborate with all member jurisdictions and other program participants to better utilize GIS to improve local and regional planning.

FISCAL IMPACT:

Staff resources are covered in the OWP under work element 15-055.SCG070.02.

ATTACHMENT:

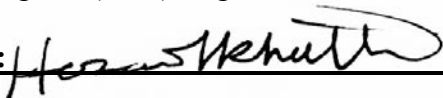
None.

DATE: April 2, 2015

TO: Regional Council (RC)
Executive Administration Committee (EAC)
Community, Economic and Human Committee (CEHD)
Energy and Environment Committee (EEC)
Transportation Committee (TC)

FROM: Huasha Liu, Director, Land-Use Planning & Environment, liu@scag.ca.gov, 213-236-1838

SUBJECT: 2015 Active Transportation Program (ATP) Regional Guidelines

EXECUTIVE DIRECTOR'S APPROVAL: 

RECOMMENDED ACTION EAC, TC:

Recommend the Regional Council approve the 2015 Active Transportation Program Regional Guidelines.

RECOMMENDED ACTION RC:

Approve the 2015 Active Transportation Program Regional Guidelines and authorize the Executive Director to submit the guidelines to the California Transportation Commission for final approval.

RECOMMENDED ACTION CEHD, EEC:

Receive and File

EXECUTIVE SUMMARY:

On March 26, 2015, the California Transportation Commission (CTC) adopted the Active Transportation Program (ATP) Statewide Guidelines and announced the 2015 Call for Projects. The 2015 ATP budget is anticipated to be approximately \$300 million and will cover fiscal years 2016/17-2018/19. Approximately 60% of the total funding awards will be recommended by the CTC through the Statewide Program and Small Urban/Rural Program components. Forty percent of the total funding awards will be recommended by regional MPOs; SCAG's share of the MPO component is approximately \$70 million. Similar to the 2014 ATP, SCAG is required to collaborate with the County Transportation Commissions to adopt regional guidelines that outline the criteria and process for selecting projects that are recommended for funding as part of the MPO component. After approval of the Regional Council, the attached 2015 Active Transportation Program Regional Guidelines will be submitted to the California Transportation Commission for adoption. The 2015 ATP Statewide Guidelines retain many of the same requirements as the 2014 Statewide Guidelines.

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan Goal 2: Obtain Regional Transportation Infrastructure Funding and Promote Legislative Solutions for Regional Planning Priorities; Objective 1: Identify new infrastructure funding opportunities with State, Federal and private partners

BACKGROUND:

The California Active Transportation Program (ATP) was created by Senate Bill 99 (Chapter 359, Statutes 2013) and Assembly Bill 101 (Chapter 354, Statutes 2013), to encourage increased use of active modes of transportation, such as biking and walking, as well as to ensure compliance with the federal transportation authorization Moving Ahead for Progress in the 21st Century (MAP-21). The goals of the Active Transportation Program are to:

- Increase the proportion of trips accomplished by biking and walking.
- Increase the safety and mobility of non-motorized users.
- Advance the active transportation efforts of regional agencies to achieve greenhouse gas reduction goals as established pursuant to Senate Bill 375 (Chapter 728, Statutes of 2008) and Senate Bill 391 (Chapter 585, Statutes of 2009).
- Enhance public health, including reduction of childhood obesity through the use of programs including, but not limited to, projects eligible for Safe Routes to School Program funding.
- Ensure that disadvantaged communities fully share in the benefits of the program.
- Provide a broad spectrum of projects to benefit many types of active transportation users.

Funds awarded through the ATP program are selected by the state (60% of total funds) as well as regional MPOs (40% of total funds).

Regional Guidelines

The ATP Regional Guidelines (Guidelines) outline the process by which SCAG in collaboration with the county transportation commissions intends to meet its requirements for implementing the project selection process for the 2015 ATP Regional Program. The Guidelines must be consistent with direction established in the Statewide Guidelines and be approved by the Regional Council and the CTC. The 2015 ATP Statewide Guidelines retain many of the same requirements as the 2014 Statewide Guidelines. Consequently, the 2015 Regional Guidelines remain largely unchanged. Key elements of the guidelines are outlined below:

- Projects selected for the regional program must be submitted as part of a Consolidated (Statewide + Regional) Call for Projects conducted by the CTC between March 26 and May 31, 2015.
- Preliminary scoring will be completed through the Consolidated Call for Projects managed by CTC.
- Projects not selected for the statewide program will be considered for funding in the regional program.
- Each county will have the ability to modify preliminary scores by adding up to 10 points (on a 110 point scale) to projects that are consistent with local and regional plans within each county.
- Geographic equity will be achieved by establishing a preliminary recommended funding list that dedicates no less than 95% of the total regional funds to Implementation Projects proportionate to the population of each county. Implementation Projects may include capital projects as well as non-infrastructure projects, such as Safe Routes to School programs and other educational and enforcement activities.
- Up to 5% of the funding in the regional program will be reserved for the development of active transportation plans. The intent of this reserve to ensure a broad spectrum of projects is funded per the goals of SB 99, while also allowing but not exceeding the requirement that no more than 5% of the regional program be spent on planning.

REPORT

- SCAG retains the authority to modify the preliminary recommended project list in order to ensure 25% of the total regional program is dedicated to projects benefitting disadvantaged communities, as required by state law.
- The final recommended project list will be reviewed by the CEOs of the county transportation commissions, Caltrans and CTC staff to make any final adjustments and achieve consensus prior to submitting the Regional Program of Projects to SCAG's Regional Council for approval prior to submission to the CTC.

Following approval by the Regional Council and thereafter by the State CTC of the Regional Guidelines, SCAG staff will continue its collaboration with the county transportation commissions to implement the regional project selection process. SCAG staff will provide updates to the Transportation Committee on the regional program, and return to the Regional Council with a recommended program of projects for the 2015 ATP regional program as early as November 2015.

FISCAL IMPACT:

Work associated with this item is included in the current FY2014/15 Overall Work Program (050.SCG00169.01: Regional Active Transportation Strategy) and FY2015/1016 Overall Work Program (050.SCG00169.06: Active Transportation Program).

ATTACHMENT:

2015 ATP Regional Guidelines

2015 Active Transportation Program Southern California Association of Governments Regional Guidelines

The intent of this document is to successfully implement the active transportation related programs and funding components of the Moving Ahead for Progress in the 21st Century Act (MAP-21) and California Senate Bill 99 (SB 99). The following Regional Guidelines outline the roles, responsibilities and processes for selecting projects to receive funding from the SCAG region's dedicated share of the 2015 California Active Transportation Program (ATP). The SCAG region's annual share is approximately \$25 million, which includes 100% of SCAG's federal Transportation Alternative Program apportionments (approximately \$14 million) plus approximately \$11 million/year from other federal and state funding programs that were consolidated by SB 99 into the ATP. These Guidelines relate to the 2015 California Active Transportation Program only, which includes three years of funding in Fiscal Year 2016/17, FY 2017/18 and FY 2018/19. The Guidelines may be revisited and modified for future rounds of funding.

Background

- The goals of the ATP program are to:
 - Increase the proportion of trips accomplished by biking and walking.
 - Increase the safety and mobility of non-motorized users.
 - Advance the active transportation efforts of regional agencies to achieve greenhouse gas reductions goals as established pursuant to SB 375.
 - Enhance public health, including reduction of childhood obesity through the use of programs including, but not limited to, projects eligible for Safe Routes to School Program funding.
 - Ensure that disadvantaged communities fully share in the benefits of the program.
 - Provide a broad spectrum of projects to benefit many types of active transportation users.
- The 2015 Active Transportation Program Statewide Guidelines describe the policy, standards, criteria and procedures for the development, adoption and management of ATP.
- Per the requirements of SB 99 and Map-21, 40% of the funds for the ATP program must be distributed by Metropolitan Planning Organizations (MPO) in urban areas with populations greater than 200,000, with funds distributed to each MPO based on total MPO population.
- The funds distributed by the MPOs must be programmed and allocated to projects selected through a competitive process in accordance with the ATP Guidelines.
- Per SB 99 and the Statewide Guidelines, the following requirements apply specifically to SCAG:
 - SCAG must consult with the county transportation commission, the California Transportation Commission (CTC), and the State Department of Transportation (Caltrans) in the development of the competitive project selection criteria. The

- criteria should include consideration of geographic equity, consistent with program objectives;
 - SCAG must place priority on projects that are consistent with plans adopted by local and regional governments within the county where the project is located; and
 - SCAG must obtain concurrence from the county transportation commissions.
- A MPO choosing to use the same project selection criteria and weighting, minimum project size, match requirement, and definition of disadvantaged communities as used by the CTC for the statewide competition may defer its project selection to the CTC.
- 25% of the regional funds must benefit disadvantaged communities.
- A large MPO may make up to 5% of its funding available for active transportation plans in disadvantaged communities.
- Non-infrastructure projects are eligible for funding; however, there is not a specific set-aside or cap for this purpose. Non-infrastructure funding is available for start-up or pilot projects that support education, encouragement, and enforcement activities—not ongoing efforts.

Regional Project Selection

In order to expedite the administrative approval process and accelerate project implementation, SCAG intends to build upon the CTC scoring and ranking process and forgo its option to issue a supplemental regional call for projects. This means that an evaluation committee will not be required at the county or regional level within the SCAG region to separately score projects.

- Once projects have been scored and ranked by CTC for the regional program, SCAG and the county transportation commissions will review and, if necessary, recommend modifications to the regional program to ensure specific statutory requirements can be met in a manner that is consistent with the intent of the law and program guidelines.
- Regional Funding Categories
 - Two funding categories will be established for the regional program to support the review and refinement of the regional program by SCAG and the County Transportation Commissions. These categories will include:
 - **Planning Projects** may include the development of active transportation plans consistent with eligibility requirements established by the CTC. Active Transportation planning projects will be funded up to the allotted maximum 5% of the regional program budget. If active transportation plans do not satisfy the 5% maximum allotment of the Regional Program and in consideration of geographic equity, Implementation Projects shall be considered.
 - **Implementation Projects** may include the planning, design, and construction of facilities and/or non-infrastructure projects (e.g., education or traffic enforcement activities).

- No less than 95% of the total regional funds will be dedicated to funding Implementation Projects.
- Up to 5% of the total regional funds will be dedicated to funding Planning Projects, consistent with the intent of the ATP to fund a broad spectrum of projects *and* to ensure that disadvantaged communities have resources to develop ATP plans, which will be an eligibility requirement for future funding cycles. If the total request in the Planning Projects Category is less than 5% of the total regional funds, or if applications in this category fail to meet minimum requirements, then the remaining funds will be allocated to Implementation Projects.
- County Transportation Commission’s Role in Project Selection
 - Prior to scoring by CTC, SCAG will provide each county with a list of **Implementation Project** applications submitted within each county.
 - The county transportation commissions will review the Implementation Project lists and determine which projects “are consistent with plans adopted by local and regional governments within the county” per the requirements of SB 99. If a project is consistent, the county will assign up to 10 points to each project. “Plan” shall be defined by each county transportation commission.
 - If a county transportation commission assigns additional points (up to 10, as noted above) to a project for which they are the lead applicant, an explanation must be provided to SCAG on how the scoring process resulted in an unbiased evaluation of projects.
 - The Board of each respective county transportation commission will approve the scoring methodology/guidelines and point assignments, and submit the scores to SCAG for inclusion in the final ranking of regional projects.
 - The Board or the Chief Executive Officer of each respective county transportation commission will adopt the final recommended project list as further described in the Recommended Regional Program of Projects section below.
- SCAG’s Role in Project Selection
 - Implementation Projects Category
 - Following the release of the preliminary scores by CTC, SCAG will develop for each county a ranked Implementation Project list reflecting the base score awarded by Caltrans plus any additional point assignments (up to 10 pts as noted above) made by the respective county transportation commission.
 - The ranked list will include a preliminary funding mark, established by the county’s population-based share of no less than 95% of the total regional

funds. The projects from each county above the preliminary funding mark will constitute the preliminary regional project list.

- SCAG will analyze the preliminary regional project list and calculate the total amount of funding to be awarded to disadvantaged communities for **Implementation Projects** across all of the counties.
 - If the total is more than 25%, SCAG will consider the preliminary regional project list as final and include it in the regional program.
 - If the total is less than 25%, SCAG will modify the preliminary regional project list to ensure the 25% mark is achieved, as follows:
 - Across all counties, the highest scored disadvantaged communities' project that is below the funding mark will be added to the regional project list. This project will displace the lowest scoring project that is above the funding mark and does not benefit a disadvantaged community, regardless of the county.
 - This process will be repeated until the 25% target is met.
 - This process may lead to an outcome where a county receives less than its population-based share of the funding, but is necessary to ensure the disadvantaged communities' requirements for the regional program are met.
 - As noted in Recommended Regional Program of Projects section below, the CEOs, Caltrans and CTC will have the opportunity to make any final adjustments to the preliminary regional project list to address any inequities that may result from this process.
- Planning Projects Category
 - SCAG will create a ranked list of **Planning Projects** reflecting Caltrans' selection process and scores, and delineating those projects that are above and below the funding mark.
 - SCAG will quantify the percentage of funding dedicated to disadvantaged communities within the Planning Category and determine the amount of funding that needs to be dedicated to disadvantaged communities to ensure requirements are met.

- SCAG will largely defer to the ranking of CTC in the selection of the planning projects, however, slight adjustments may be made to the ranking to ensure planning projects are supported in all counties.
- Recommended Regional Program of Projects
 - SCAG will combine the projects selected from the Planning and Implementation Projects Categories to create a preliminary Regional Program of Projects (Program).
 - The final recommended Regional Program of Projects will be reviewed by the CEOs of the county commissions, Caltrans and CTC staff to make any final adjustments and achieve consensus prior to submitting the Program to SCAG's Regional Council and the Boards or Chief Executive Officers of the county transportation commissions for approval and submission to the CTC.
 - Technical Adjustments: The SCAG CEO, the CEO of each County Transportation Commission, and their designees may make technical changes to the program as needed to ensure the timely delivery of the regionally-selected projects.