



Technical Assistance
for Local Planning
HOUSING

Index of Regional Housing Technical Assistance Products

This document outlines all the resources developed by the Regional Housing Technical Assistance (RHTA) Program to date.

Housing Elements & HCD Comments

This [page](#) includes all the RHTA resources on draft Housing Elements and HCD comments.

- Staff are tracking the submission of Bay Area draft Housing Elements and the comments jurisdictions receive from HCD. Copies of the drafts and HCD comment letters are available [via this link](#).
- ABAG staff and consultants have reviewed Housing Element comment letters for Bay Area jurisdictions as HCD has released them. A total of 24 jurisdictions have received comment letters as of November 3, 2022. [This document](#) summarizes key findings from the comments.
- [Learning from Southern California and Sacramento](#): Analysis of HCD comment letters and lessons for Bay Area jurisdictions as they prepare their 6th cycle Housing Elements.
- [Responding to HCD Comments for Certification](#): These case studies summarize how four cities in Southern California and the Sacramento region responded to challenging HCD comments related to sites inventory, AFFH and other Housing Element topics. The documents present important strategies that cities in the ABAG region can use to prepare their Housing Elements for certification.

Affirmatively Furthering Fair Housing

Recently, the [Affirmatively Furthering Fair Housing Policies and Programs Toolkit was released](#) to assist local jurisdictions with completing the crucial step of establishing AFFH goals, policies and actions in the Housing Element. The toolkit highlights 15 key strategies Bay Area jurisdictions can implement to further fair housing. The AFFH Policies and Programs Toolkit was reviewed by HCD staff and incorporates their feedback. HCD has emphasized in recent comments on Bay Area jurisdictions' draft Housing Elements that AFFH should be central to the Housing Element's overarching goals and inform all objectives and policies. An Affirmatively Furthering Fair Housing Policy Resources [Annotated Bibliography also summarizes](#) existing housing policy resources which help identify goals, policies and actions to address a range of fair housing issues.

Staff hosted two webinars and launched the first set of AFFH resource products during the summer of 2021. The first webinar, *AFFH: The Nuts and Bolts with HCD*, was held June 22, 2021 and covered the basics of AB 686 and outlined new requirements for the Housing Element. The second webinar, *AFFH: Data Deep Dive*, was held July 13, 2021 and served as a more focused look into the analysis required for the Assessment of Fair Housing (AFH), and specifically the segregation and integration patterns analysis, which featured ABAG's work with UC Merced via the [STIR Labs partnership](#). Both webinar recordings and presentation materials can be found on ABAG's Regional Housing Technical Assistance Training [website](#).

As a follow up to the July webinar, the AFFH template [staff report](#) and [slide deck](#) were released for jurisdiction staff to use in introducing the new requirements to their local decisionmakers. Additionally, staff disseminated a [AFFH Data Guidance Checklist](#) which provides sources to data points outlined in the AFH. The final version of this checklist is in development and pending release.

Additional AFFH TA includes:

- AFFH layer added to HESS tool
- [Segregation and Land Use Reports](#): Each jurisdiction’s report and accompanying dataset provide segregation measures for both the local jurisdiction and the region using several indices, as required by the AFFH guidance issued by the California Department of Housing and Community Development (HCD). Local jurisdiction staff can use the segregation report and dataset to complete a component of the Assessment of Fair Housing, which requires analysis of segregation patterns related to race, other protected characteristics, and lower-income households.
- [AFFH Tips Memo](#): This document provides a summary review of HCD comments on Housing Elements submitted from other jurisdictions throughout the state to identify common pitfalls and make recommendations about how Bay Area jurisdictions can craft policies to meet AFFH goals -streamlining the path towards certification.
- Leading with Equity Working Group. Launched in March 2022 with 15 planning and housing department staff who have self-selected to advance racial and housing equity policies and programs within their Housing Element work. the work group focuses on promoting leadership development, capacity building toward understanding and navigating institutional change, peer-support and one-on-one coaching.

Webinars

Since the RHTA program began, 24 webinars have provided information on a variety of topics. All webinar materials are available on this [webpage](#).

- Bay Area Priority Sites Pilot Program
- How to Address HCD Comments for Certification
- Turner Center and ABAG Present: Best Practices to Implement SB 9 and Missing Middle Housing in the Bay Area
- Leveraging Your Land: Best Practices for Reusing Public Land for Housing
- Transforming Aging Malls and Office Parks: Reuse Challenges and Opportunities
- Housing Planning: For the Future
- Planning Innovations Webinar: Regional Data Tools for the Housing Element
- Housing Element 101 - Overview and New Laws + Tips
- Creating Capacity: An Overview of the Sites Inventory
- Using Data Effectively in Housing Element Updates – ABAG’s Housing Needs Data Packets and Accessing the US Census
- How to Talk About Housing – Data-Driven Lessons on Housing Communications that Work and Those that Backfire
- Incorporating Environmental Justice and Safety into your Housing Element
- Housing Sites Inventory - Deep Dive
- Engage How To! Introduction to Remote Meeting Tools
- Affirmatively Furthering Fair Housing: The Nuts and Bolts with HCD
- Affirmatively Furthering Fair Housing: Data Deep Dive
- Integrating Climate Adaptation/Resilience into Your Housing Element

- Context of SB 9 and Potential Impacts
- HESS Tool 1.0 Tutorial Webinar
- Surplus Public Land: webinar and presentation
- New Housing Law: webinar and presentation
- Keep Calm and Certify On: Tips from Early Adopters
- New Annual Progress Report Requirements with HCD
- Webinar for Elected Officials: Learn About Available Assistance for Housing Element Updates

Upcoming

- 2022 New Housing Laws Webinar. 11/15 2:00 Registration link:
https://bayareametro.zoom.us/meeting/register/tZckcOisqzMvEtWHPBE_F5sdVGziiXdkVj8b

Communications, Messaging & Community Engagement

Recent products include:

- ["Let's Talk About Housing:" Communications Guide for Local Government](#)
This document is a data-driven communications guide for use by staff and elected officials to foster productive conversations with residents about housing. The guide is based on existing and new research and includes consistent, clear language for discussions about affirmatively furthering fair housing (AFFH) legislation.
- [Best Practices for Equitable Engagement Primer](#)
This document shares effective ways to engage communities and stakeholder organizations that traditionally are underrepresented in local government processes. It is designed to provide local jurisdictions with a range of tools, strategies and best practices for engaging all community members.
- Consultant support (communications coaching, meeting facilitation services, meeting materials).
- [508 compliance guidelines](#)
- [Missing Middle photo gallery with density information](#)
- [CBO and media contact lists](#)

Previously released information:

- Housing Element Webinar: [How to Talk About Housing](#) – Data-Driven Lessons on Housing Communications that Work and Those that Backfire (4/27/2021)
- Housing Element Webinar: [Engage How To! Introduction to Remote Meeting Tools](#) (5/25/2021)
- Balancing Act online public engagement housing simulation tool available for 25 jurisdictions and reduced rate negotiated for additional jurisdictions
- [Access to template survey](#) for jurisdictions to send to community members to gather information about housing issues and concerns
- Access to tool kit, including messaging guide to provide assistance in discussing housing and AFFH with community members. Several items of the tool kit have already been produced and are available on the website, including [Consequences of Non-Compliance with Housing Element Update](#).
- [Housing TA portal](#), allowing ease of access to range of relevant materials
- [Guide to Housing Element + AFFH Public Participation](#)
- Assistance with translation and interpretation ([link](#)).
- [Best practices for engaging multilingual constituents](#)

Upcoming

- Guidance on outreach to farmworkers

- AFFH outreach after comment letters
- REAP 2.0 outreach

Housing Data Tools

[Housing Needs Data Packets](#) for all 109 Bay Area jurisdictions contain tables, figures, and accompanying text for over 60 data points that can be placed directly into the Housing Needs section of each jurisdiction’s housing element. The data packets were [pre-reviewed by HCD for consistency with state requirements](#) to create predictability during the Housing Element review process.

[Housing Element Site Selection “HESS” Tool](#), launched in Fall 2020, is a web-based mapping platform that assists Bay Area jurisdictions with site identification for Housing Element site inventories and flags sites that will likely require rezoning to be used under new state laws. In Fall 2021, ABAG launched a [1.0 update](#) to the HESS Tool based on feedback received from local planning staff, consultants, subject-matter experts and HCD. Updates included more granular screening categories, additional filters, an editing module to update underlying local land use data, and more.

HESS Tool 2.0 Modules were released in April 2022. The first module is an **AFFH Map** which allows local planners to visualize the distribution of their site inventories alongside key AFFH data layers. The second module supports jurisdictions with the **Realistic Capacity Calculations** for sites included in their inventories. ABAG has collected and analyzed data from local jurisdictions’ Annual Progress Reports, Zoning Ordinances, and General Plans to adjust the theoretical maximum capacity of sites to reflect historical building trends more accurately. Users can generate realistic capacity reports prepopulated with this data, which can be submitted to HCD as supportive documentation. AFFH attributes have also been added to the site inventory form and local staff can produce their own pivot tables.

HESS Office Hours are available on an ongoing basis – staff can request office hour and make other data requests by emailing Heather Peters at hpeters@bayareametro.gov.

Webinar Recordings

- 10/29/2020: [Planning Innovations Webinar: Regional Data Tools for the Housing Element: Webinar video recording](#) and [Webinar presentation](#)
- 3/9/2021: ABAG Housing Element Series: [Creating Capacity: An Overview of the Sites Inventory: Webinar video recording](#) and [Webinar presentation](#)
- 3/23/2021: ABAG Housing Element Series: [Using Data Effectively in Housing Element Updates: Webinar video recording](#) and [Webinar presentation](#). Introduces the ABAG housing needs data packets and provides information on accessing the U.S. Census.
- [HESS Tool 1.0 Tutorial Webinar](#)

Peer Cohorts and Work Groups

- Missing Middle Workgroup
 - a. Products
 1. Slide templates and talking points for use by staff
 2. Market report and interactive feasibility analysis tool
 3. Zoning guidebook
 4. Affordability strategies guidebook
 5. RHNA guidance memo
 6. [Middle Market Housing Development Tool](#)

b. Links

- [Session 1: What is the Missing Middle?](#)
 - [Session 2: The Middle Housing Market](#)
 - [Session 3: Making Middle Housing Happen](#)
 - [Session 4: Making Middle Housing Affordable](#)
 - [Session 5: Projecting Middle Housing Production](#)
- Wildfire: all four sessions including webinar recordings, presentations, and resource guides are on [this website](#).
 - “Big 3” Cohort (Oakland, San Francisco and San Jose)
 - Leading with Equity Work Group
 - [Malls & Office Parks Transformation Work Group \(ongoing\)](#)

Upcoming

- Leading with Equity Work Group resources and products
- Agricultural Communities Cohort

Other Regional Products

- [The Builders’ Remedy and Housing Element Paper](#)
 - This paper describes the provisions of the Housing Accountability Act that constitute the "Builder’s Remedy" and how they may apply to a proposed housing development project.
- [Overview of AB 2011 and SB 6](#)
 - AB 2011, the Affordable Housing and High Road Jobs Act of 2022 and SB 6, the Middle Class Housing Act of 2022, are intended to permit residential development on sites currently zoned and designated for commercial or retail uses. Both bills were signed into law by Governor Gavin Newsom on September 29, 2022, and will go into effect on July 1, 2023. This document presents a summary of key details of each bill.
- [Farmworker Housing Toolkit](#)
 - This Farmworker Housing Toolkit provides a one-stop source of information to assist local agencies in including the special housing needs of Farmworkers within their Housing Elements with the legislative framework, data, policies and programs that local jurisdictions can reference in the development of their farmworker housing needs analysis for their Cycle 6 Housing Element.
- [SB 9 materials:](#)
 - Webinar, slide deck, memo templates, Summaries, FAQ and Other References
 - Model ordinance
 - Objective Design and Development Standards (ODDS)
 - SB 9 application checklist for two-unit developments and urban lot splits
 - Sample deed restrictions for two-unit development and lot splits
 - Sample Affidavit regarding owner-occupancy
- ADU Affordability Safe Harbor – counting towards RHNA
- [Consequences of Non-Compliance with Housing Element Update](#)
- Pilot of Symbium Plancheck software to streamline permitting ([see announcement](#))
 - Second round recruitment in process – deadline 12/16/2022

- Parking Technical Assistance:
 - [Parking toolbox and handbook](#)
 - [Parking presentation and webinars](#)
 - Future parking assistance [sign up form](#)

Upcoming

- Round 2 legal products under way (draft in a month)
 - Regulator agreements checklist
 - New laws cheat sheet
 - Affordable housing replacement requirements/tenant relocation

Templates

- [Jurisdiction Housing Element RFP Template](#) a request for Proposals (RFP) template for local jurisdictions to hire consultants to assist with Housing Element updates
- [Housing Element Staff Report Template](#)
- [Housing Element Timeline Template](#)
- [What is a Housing Element? Briefer Template](#)
 - [What is a Housing Element? Briefer Template \(Word version\)](#)
 - [What is a Housing Element? Briefer Template \(Spanish translation version\)](#)
 - [What is a Housing Element? Briefer Template \(Chinese translation version\)](#)
- [Housing Element FAQs Template](#)
- [AFFH Template Staff Report](#)
- [AFFH Template Staff Slide Deck](#)
- [AFFH Data Guidance Checklist](#)

Resilience Technical Assistance

- [Briefer on Integrated Planning - EJ and Safety Element Updates](#)
- [Sample Agenda for Integrating Planning](#)
- [Safety Element New Requirements](#)
- [Status of Resilience and EJ Planning in the Bay Area](#)
- ABAG webinar co-hosted by California Office of Planning & Research: [Incorporating Environmental Justice and Safety into your Housing Element: Webinar video recording](#) and [Webinar presentation](#)

Regional Planning Consulting Bench

ABAG has established a Regional Planning Bench with 92 consultants in 11 service categories. The Bench is available to all jurisdictions in the Bay Area to use in accordance with their local procurement rules.

ABAG launched a labor-saving online tool from City Innovate that allows jurisdictions to easily search bench consultant profiles and compare consultants' qualifications and rates. The tool also facilitates informal solicitations of quotes for work when applicable procurement rules allow.

Related Links

- [Frequently Asked Questions](#) regarding the Grants and Regional Planning Consulting Bench
- [Request for Qualifications](#) used to seat the Regional Planning Consulting Bench

Local Grants

Funding amounts can be found in this [Grant Amounts spreadsheet](#). Draft funding agreements were sent to all Bay Area jurisdictions in July offering each the option of receiving reimbursements for eligible expenses, or the option of electing to have ABAG hold the funds and administer consulting contracts on behalf of the recipient jurisdiction. [REAP Non-competitive Allocation: Eligible Activities](#).

County Planning Collaboratives

County-based groups staffed by a paid coordinator who provides technical assistance and facilitates cross-jurisdiction engagement for the Housing Element updates and other housing-related topics.

Collaborative Contacts:

1. Alameda: Alexia Rotberg, UPP, arotberg@up-partners.com
2. Contra Costa: Mark Hoffheimer, MIG, mhoffheimer@migcom.com
3. Marin: Jillian Zeiger, Marin County, jzeiger@marincounty.org
4. Napa/Sonoma: Jane Riley, 4Leaf, jriley@4leafinc.com
5. Santa Clara: Paul Peninger, BAIRD + DRISKELL, peninger@bdplanning.com
6. San Mateo: Josh Abrams, BAIRD + DRISKELL, abrams@bdplanning.com
7. Solano: Robert Guerrero, STA, rguerrero@sta.ca.gov

Recording of Planning Collaboratives Kick-Off April 13, 2021. This webinar introduces the County Planning Collaboratives:

- [Planning Collaboratives Kick-Off: Webinar video recording](#)
- [Planning Collaboratives Kick-Off: Presentation](#)
- Additional resource from the webinar: [A Collaborative Approach to Addressing our Housing Challenges](#)

HCD Technical Assistance

- [Housing Planning Hub Site](#) is a repository of statewide and regional toolkits, factsheets, and guidance on a variety of housing policy areas with a specific focus on [priority policy areas](#). HCD will continually update the resource center as new tools become available.
- [Prohousing Designation](#) free technical assistance to gain designation and bonus points for state funding programs.
- [Housing Element Educational Video](#) for the 6th cycle housing element update targeting local elected officials, stakeholders, and the public. This video is available for free in English and Spanish with closed captioning. Local governments can embed links to the video on their websites.