



Bay Area Metro Center  
375 Beale Street  
Suite 700  
San Francisco, California

## Meeting Agenda - Final

### ABAG Housing Methodology Committee

*Chair, Jesse Arreguin, Mayor, City of Berkeley*

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Thursday, November 14, 2019

10:00 AM

1111 Broadway, Suite 800, Oakland

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#### Association of Bay Area Governments Housing Methodology Committee

The ABAG Housing Methodology Committee may act on any item on the agenda.

The meeting is scheduled to begin at 10:00 a.m.

Agenda and roster available at <https://abag.ca.gov>

For information, contact Clerk of the Board at (415) 820-7913.

#### Roster

Josh Abrams, Anita Addison, Jesse Arreguin, Rupinder Bolaria, Rick Bonilla, Michael Brilliot, Monica Brown, Amanda Brown-Stevens, Paul Campos, Ellen Clark, Diane Dillon, Forrest Ebbs, Pat Eklund, Jonathan Fearn, Victoria Fierce, Neysa Fligor, Mindy Gentry, Russell Hancock, Paolo Ikezoe, Welton Jordan, Megan Kirkeby, Brandon Kline, Jeffry Levin, Fernando Marti, Rodney Nickens, Jr., Julie Pierce, Bob Planthold, Darin Ranelletti, Matt Regan, Jane Riley, Carlos Romero, Elise Semonian, Aarti Shrivastava, Vin Smith, Matt Walsh

#### 1. Call to Order / Roll Call / Confirm Quorum

#### 2. Public Comment

*Information*

#### 3. Chair's Report

##### 3.a. [19-1297](#) ABAG Housing Methodology Committee Chair's Report

**Action:** Information

**Presenter:** Jesse Arreguin

**Attachments:** [Item 03a1 HMC Meeting #1 Detailed Summary.pdf](#)  
[Item 03a2 Memo Correspondence from HMC Members.pdf](#)  
[Meeting #2 Presentation Slides - 11.4.2019 v3.pdf](#)

#### 4. Consent Calendar

- 4.a. [19-1298](#) Approval of ABAG Housing Methodology Committee Minutes of October 18, 2019
- Action:** Approval
- Presenter:** Clerk of the Board
- Attachments:** [Item 04a Minutes Draft 20191018.pdf](#)

#### 5. Chartering Conversation

- 5.a. [19-1299](#) Continuation of HMC Chartering Conversation
- The HMC will continue its discussion to finalize the committee's decision making process and norms.
- Action:** Information
- Presenter:** Amber Shipley, Civic Edge Consulting
- Attachments:** [Item 05a0 Summary Sheet HMC Chartering Revisions.pdf](#)  
[Item 05a1 Attachment A Memo Revised Decision Process for HMC Meetings v2](#)  
[Item 05a2 Attachment B Memo Revised Norms for HMC Meetings.pdf](#)  
[Item 05a3 Attachment C Tracked Changes Norms for HMC Meetings.pdf](#)  
[Item 05a4 Attachment D Memo Key Brown Act Requirements v4.pdf](#)

#### 6. Panel Discussion

- 6.a. [19-1300](#) Panel Discussion: Perspectives on Promoting Equity in RHNA
- This panel will provide HMC members with information about the new RHNA objectives and factors related to affirmatively furthering fair housing and jobs-housing fit.
- Action:** Information
- Presenter:** Gillian Adams, Moderator; Tyrone Buckley, Senior Policy Specialist, California Department of Housing and Community Development (HCD); Sarah Treuhaft, Managing Director, PolicyLink; and Eli Moore, Program Manager, Haas Institute for a Fair and Inclusive Society
- Attachments:** [Item 06a0 Summary Sheet Panel Discussion.pdf](#)  
[Item 06a1 Attachment A Presenter Bios.pdf](#)  
[Item 06a2 Presentation Othering and Belonging v1.pdf](#)

## 7. Local Jurisdiction Survey

### 7.a. [19-1301](#) Local Jurisdiction Survey

Discussion of a draft of the Local Jurisdiction Survey required to be conducted by ABAG per Housing Element Law.

**Action:** Information

**Presenter:** Gillian Adams

**Attachments:** [Item 07a0 Summary Sheet Local Jurisdiction Survey.pdf](#)  
[Item 07a1 Attachment A Memo Survey and AFFH Overview.pdf](#)  
[Item 07a2 Attachment B RHNA Statutory Factors.pdf](#)  
[Item 07a3 Attachment C DRAFT Local Jurisdiction Survey v3.pdf](#)

## Lunch / Break

## 8. Introduction to Factors

### 8.a. [19-1302](#) Introduction to Factors Via HMC's Housing Goals

Staff will report on the key themes envisioned by the HMC in its discussion of desired goals and outcomes for the RHNA process and continue the conversation about relating these goals to methodology factors.

**Action:** Information

**Presenter:** Gillian Adams

**Attachments:** [Item 08a0 Summary Sheet Report on Visioning v2.pdf](#)  
[Item 08a1 Attachment A Memo Intro to Factors via HMC Housing Goals.pdf](#)  
[Item 08a2 Attachment B Visioning Housing Goals Summary.pdf](#)  
[Item 08a3 Attachment C RHNA Statutory Objectives and Factors.pdf](#)

## 9. Feedback on Today's Meeting

### 9.a. [19-1303](#) Feedback on Today's Meeting and What to Expect at the Next Meeting

**Action:** Information

**Presenter:** Gillian Adams

## 10. Adjournment / Next Meeting

*The next meeting of the ABAG Housing Methodology Committee is on December 19, 2019, at the Alameda County Transportation Commission, 1111 Broadway, Suite 800, Oakland.*

**Public Comment:** The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

**Meeting Conduct:** If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the Committee may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

**Record of Meeting:** Committee meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site ([mtc.ca.gov](http://mtc.ca.gov)) for public review for at least one year.

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**可及性和法令第六章:** MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

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Attachments are sent to Committee members, key staff and others as appropriate. Copies will be available at the meeting.

All items on the agenda are subject to action and/or change by the Committee. Actions recommended by staff are subject to change by the Committee.





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 19-1297      **Version:** 1      **Name:**

**Type:** Report      **Status:** Informational

**File created:** 11/4/2019      **In control:** ABAG Housing Methodology Committee

**On agenda:** 11/14/2019      **Final action:**

**Title:** ABAG Housing Methodology Committee Chair's Report

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**Code sections:**

**Attachments:** [Item 03a1 HMC Meeting #1 Detailed Summary.pdf](#)  
[Item 03a2 Memo Correspondence from HMC Members.pdf](#)  
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Date	Ver.	Action By	Action	Result
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ABAG Housing Methodology Committee Chair's Report

Jesse Arreguin

Information



CIVIC EDGE CONSULTING

25 Taylor Street, San Francisco, CA 94102

# MEMO

To: RHNA HMC Team  
From: Civic Edge Consulting  
Date: October 30, 2019  
RE: October 18 HMC Meeting #1 Notes - DRAFT



## Meeting Info

HMC Meeting #1  
Friday, October 18, 2019  
Bay Area Metro Center

## Meeting Staffing

- Gillian Adams, Principal Planner, Regional Housing Need Allocation (RHNA)
- Dave Vautin, Assistant Director of Major Plans
- Matt Maloney, Acting Director of Planning
- Matthew Lavrinets, Senior Counsel
- Brad Paul, Deputy Executive Director
- Fred Castro, ABAG Clerk of the Board
- Amber Shipley, Paisley Strellis, Maegen Hoover, Facilitation, Civic Edge Consulting

## HMC Roster

### Elected Officials

- Jesse Arreguín, Mayor, City of Berkeley
- Rick Bonilla, Councilmember, City of San Mateo
- Monica Brown, Supervisor, County of Solano
- Diane Dillon, Supervisor, County of Napa
- Pat Eklund, Councilmember, City of Novato
- Neysa Fligor, Councilmember, City of Los Altos
- Julie Pierce, Vice Mayor, City of Clayton

Alternates:

- John Vasquez, Supervisor, Solano County

### Jurisdiction Staff

- Josh Abrams, Baird + Driskell Community Planning, Staff to 21 Elements
- Michael Brilliot, Deputy Director, Citywide Planning, City of San Jose
- Ellen Clark, Planning Manager, City of Pleasanton

- Forrest Ebbs, Community Development Director, City of Antioch
- Mindy Gentry, Planning Manager, City of Concord
- Paolo Ikezoe, Senior Planner, City and County of San Francisco
- Darin Ranelletti, Policy Director for Housing Security, City of Oakland
- Jane Riley, Comprehensive Planning Manager, Sonoma County
- Elise Semonian, Planning Director, Town of San Anselmo
- Aarti Shrivastava, Assistant City Manager/Community Development Director, City of Mountain View
- Vin Smith, Community Development Director, City of Napa
- Matt Walsh, Principal Planner, Solano County

**Alternates:**

- Jennifer Carman, Development Services Director, City of Morgan Hill
- Andrew Crabtree, Community Development Director, City of Santa Clara
- David Feinstein, Principal Planner, City of Fairfield
- Noah Housh, Community Development Director, City of Cotati
- Milan Nevajda, Deputy Planning Director, Sonoma County

**Stakeholders**

- Anita Addison, Chief of Planning and Strategic Advancement, La Clinica de la Raza
- Amanda Brown-Stevens, CEO, Greenbelt Alliance
- Rupinder (Ruby) Bolaria Shifrin, Manager, Housing Affordability Initiative, Chan Zuckerberg Initiative
- Paul Campos, Senior Vice President of Governmental Affairs & General Counsel, Building Industry Association of the Bay Area (BIA)
- Jonathan Fearn, Senior Director, Development, Greystar Development
- Victoria Fierce, Co-Executive Director, California Renter Legal Advocacy and Education Fund (CaRLA)
- Russell Hancock, President & CEO, Joint Venture Silicon Valley
- Welton Jordan, Vice President, Real Estate Development, EAH Housing
- Brandon Kline, Associate Director of Environmental Programs, San Francisco State University
- Jeffrey Levin, Policy Director, East Bay Housing Organizations (EBHO)
- Fernando Martí, Co-Director, Council of Community Housing Organizations
- Rodney Nickens, Jr., Policy Manager, Non-Profit Housing Association of Northern California (NPH)
- Bob Planthold, Gov't. & Community Advocates Strategies, Inc.
- Matt Regan, Senior Vice President, Public Policy, Bay Area Council
- Carlos Romero, Urban Ecology

**State Partners**

- Megan Kirkeby, Assistant Deputy Director for Fair Housing, California Department of Housing & Community Development (HCD)

**Alternates:**

- Tom Brinkhuis, California Department of Housing & Community Development (HCD)
- Kevan Rolfness, California Department of Housing & Community Development (HCD)



## Meeting #1 Small Group Assignments

### Quarry Lake:

- Jesse Arreguín, Mayor, City of Berkeley
- Elise Semonian, Planning Director, Town of San Anselmo
- Jane Riley, Comprehensive Planning Manager, Sonoma County
- Victoria Fierce, Co-Executive Director, California Renter Legal Advocacy and Education Fund (CaRLA)
- Paul Campos, Senior Vice President of Governmental Affairs & General Counsel, Building Industry

### Lake Chabot:

- Julie Pierce, Vice Mayor, City of Clayton
- Darin Ranelletti, Policy Director for Housing Security, City of Oakland
- Aarti Shrivastava, Assistant City Manager/Community Development Director, City of Mountain View
- Rodney Nickens, Jr., Policy Manager, Non-Profit Housing Association of Northern California (NPH)

### Felt Lake:

- Pat Eklund, Councilmember, City of Novato
- Michael Brilliot, Deputy Director, Citywide Planning, City of San Jose
- Fernando Martí, Co-Director, Council of Community Housing Organizations
- Jonathan Fearn, Senior Director, Development, Greystar Development
- Amanda Brown-Stevens, CEO, Greenbelt Alliance

### Lake Merced:

- Diane Dillon, Supervisor, County of Napa
- Mindy Gentry, Planning Manager, City of Concord
- Josh Abrams, Baird + Driskell Community Planning, Staff to 21 Elements
- Russell Hancock, President & CEO, Joint Venture Silicon Valley
- Brandon Kline, Associate Director of Environmental Programs, San Francisco State University

### Lake Lagunitas

- Monica Brown, Supervisor, County of Solano
- Forrest Ebbs, Community Development Director, City of Antioch
- Paolo Ikezoe, Senior Planner, City and County of San Francisco
- Jeffrey Levin, Policy Director, East Bay Housing Organizations (EBHO)
- Rupinder (Ruby) Bolaria Shifrin, Manager, Housing Affordability Initiative, Chan Zuckerberg Initiative



## Kent Lake

- Carlos Romero, Urban Ecology
- Vin Smith, Community Development Director, City of Napa
- Megan Kirkeby, Assistant Deputy Director for Fair Housing, California Department of Housing & Community Development (HCD)
- Welton Jordan, Vice President, Real Estate Development, EAH Housing

## Lake Sonoma

- Ellen Clark, Planning Manager, City of Pleasanton
- Matt Walsh, Principal Planner, Solano County
- Matt Regan, Senior Vice President, Public Policy, Bay Area Council
- Rick Bonilla, Councilmember, City of San Mateo
- Bob Planthold, Gov't. & Community Advocates Strategies, Inc.

## Meeting Notes by Agenda Item

### 1. Call to Order / Roll Call / Confirm Quorum – Fred Castro

### 2. Welcome Remarks – Brad Paul

#### HMC Member Comments/Questions:

- **Bob Planthold:** Asked if the HMC will be discussing needs other than income/affordability. He noted that people with disabilities and seniors need support with housing regardless of their income – and there is an undersupply of accessible homes for them.
  - **Gillian Adams:** Confirmed that the RHNA focuses on allocating units by income and local jurisdictions will look at strategies to address the housing needs of specific populations when developing their Housing Elements.

### 3. Regional Housing Need Allocation Overview – Gillian Adams

#### HMC Member Comments/Questions:

- **Planthold:** Asked what data would be used to evaluate the 14 factors the HMC is required to consider in their recommendations. Specifically, he was interested in the data and guidelines for overcrowding. Also, if agricultural land would include only traditional crops or if it would also include marijuana.
  - **Adams:** Confirmed that these are the types of questions the HMC will be exploring as a committee. As a committee, the HMC can work to figure what are the right data sources to make these determinations and how we want to apply those to these factors.
- **Pat Eklund:** Requested a briefing on the methodology used during the last RHNA cycle, noting that a number of concepts from Plan Bay Area were integrated into the last cycle's work.



- **Adams:** Responded that the methodology used previously could be circulated for the next meeting if that would be helpful for the committee.
- **Darin Ranelletti:** Asked for clarification around the status of statutory objective #4: Balance disproportionate household income distributions (more high-income RHNA to lower-income areas and vice-versa) and if the parenthetical was an example or mandate?
  - **Megan Kirkeby:** This objective was added as statutory language, and it is not just an example. The statute is that more high-income housing should be going to lower-income areas and vice versa.
- **Josh Abrams:** Asked if the 14 factors are exclusive or if the HMC can look at others?
  - **Adams:** Confirmed that the HMC can add additional factors as long as they are consistent with the statutory objectives.
- **Jeffrey Levin:** Noted that in the past, robust income adjustments did not always make much of a difference if a jurisdiction's total number of units was low to begin with. He followed up to inquire whether the HMC may look at the size of the initial allocations before making income adjustments, and whether they must do this in a two-step process, or if they could consider other approaches.
  - **Adams:** Confirmed that the HMC can look at other approaches, but will need to refer back to the five statutory objectives of RHNA when doing so.

#### **Public Comments:**

- **Shajuti Hossain, Public Advocates:** Emphasized the new requirement to affirmatively further fair housing – meaning that ABAG and the HMC will have to pay attention to racial equity and focus on ways to make sure that there is more racial integration in segregated areas. Additionally noted requirements on transparency: we must also reach protected classes – racial and low income. This needs to be worked on throughout the meetings and hearings.
- **Tim Frank, Center for Sustainable Neighborhoods:** Requested that the HMC look at the methodology from last cycle and note its problems and how to avoid them, particularly the role of voluntary adoption of Priority Development Areas (PDAs). He shared his perspective that many suburbs got relatively low allocations in the last round, despite having high numbers of low-income jobs and a high in-commute population. He hoped that this round of RHNA will ensure that communities with a high number of low-income jobs will receive a high low-income housing allocation in order to address this, citing Marin and Napa as examples.

#### **4. Housing Methodology Committee Chartering Conversation Overview – Amber Shipley**

##### **HMC Member Comments/Questions:**

- **Planthold:** Inquired whether there was a point of contact to whom we can direct all questions.



- **Amber Shipley:** HMC members may email questions to [rhna@thecivicedge.com](mailto:rhna@thecivicedge.com). This will help streamline ABAG staff's ability to respond.
- **Eklund:** Requested that HMC members receive materials far enough in advance of meetings to review and gather feedback from city staff, colloques, and constituents – preferably one week in advance of meetings.
  - **Adams:** Specified that a week is the goal, with a minimum of three days, to get materials to HMC members before a meeting.
- **Monica Brown:** Requested email notifications of member-submitted questions so they are not duplicated. Also suggested an internal email list where members can have conversations before meetings.
  - **Planthold:** Noted that HMC members will need strict norms in place to ensure we do not converse only via email outside of regular meeting times.
  - **Adams:** Noted that the HMC members and meetings are subject to the Brown Act.
- **Eklund:** Further noted that if HMC members receive materials only three days before a meeting, they will not be as prepared and ABAG staff will have to spend time walking through materials with them. She also voiced that three days will also not give members enough time to circulate materials and get feedback from other colleagues.
- **Victoria Fierce:** Requested a briefing on how the Brown Act applies to HMC members at the next meeting.
- **Brown:** After the discussion of the Fist of Five voting method, Brown noted her opposition to affirming a decision that no one felt positively about (in the case of all 1's). She noted that this process does not feel like real consensus.
  - **Rupinder (Ruby) Bolaria-Shifrin:** Agreed and noted that if something is not liked by everyone, the HMC needs to have time to have a conversation about it.
  - **Eklund:** Seconded fellow HMC member's comments and suggests that voting should be easier and more straight forward. Noted that the Fist of Five method is too confusing.
  - **Levin:** Commented that with this method, it seems there are five ways to vote yes, and one way to vote no. He suggested that if the group shows a lot of ones and twos when voting, they should not move forward with making a decision.
  - **Shipley:** Suggested that the group can alter the voting method and make it so they must have a conversation about suggestions for moving toward consensus before making a decision if there are a lot of 1's and 2's displayed during the voting process.
  - **Adams:** Noted aiming for consensus is great, but that the group may not get there every time. She expressed that ABAG staff wants to be able to communicate a range of thoughts from the HMC with the selected voting method.
  - **Fernando Marti:** Suggested that there be three ways to vote instead of five (fist to stop action, one finger to indicate "I can live with it," and two fingers to



indicate "I love it"). He noted that the goal of consensus is to get all members to an "I can live with it" or "I love it" after conversation.

- **Fierce:** Expressed support for modified consensus voting and suggested the committee consider three voting options instead of five.
- **Ranelletti:** Requested clarification of the HMC timeline.
  - **Adams:** HMC members will attend one meeting a month until April. Meetings will be three hours in length unless it is determined that the HMC needs more time for each meeting.
  - **Eklund:** Requested that a schedule of future meetings be sent to members in an email.

### **HMC Member Report Outs – Norms:**

- **Table – Quarry Lake:**
  - Snacks at meetings.
  - Respecting facilitators.
  - Ensuring everyone gets to speak once before the group lets people speak twice.
  - Standing up name placards instead of raising hands to speak.
  - Revisiting big decisions at future meetings if there is not consensus.
  - Allowing time for feedback from constituents before meetings.
- **Table – Lake Chabot:**
  - Limit interruption of the speakers while they are mid-presentation.
  - Implement three levels of voting and eliminate the fist option as no one should intend to block the process of consensus. If there is a majority of 1's and 3's when voting, the group may need to keep talking. If there is a majority of 3's and 5's, a decision can move forward.
  - Consider W.A.I.T. (thinking "why am I talking?") and give everyone a chance if you have spoken frequently; if you have not spoken yet, try to speak up.
  - If meetings need to go over time, the HMC should take a vote as a group to determine if the meeting will continue or adjourn.
  - Prefer that norm # 1 be phrased as "...increase housing in all income levels throughout the Bay Area."
- **Table – Felt Lake:**
  - Focus discussions on a fair methodology for all levels of income in the Bay Area during meetings.
  - Adding a sentence to suggested norm #3 stating that all materials will be shared one week in advance of meetings to HMC members.
  - Implement a voting method with three options rather than five.
  - Clarify what the fist means when voting: if a participant indicates that there needs to be further discussion on an issue, this should be taken down by ABAG staff and recorded in the meeting. Then the HMC can have discussion on amendments to a measure to gather further support.
  - Use a red card, yellow card, and green card to vote rather than hand signals.





- **Table – Lake Merced:**
  - Be mindful about how decisions will affect the region when voting.
  - Be sure that participation is equitable among members and identify appropriate times for questions and comments.
- **Table – Lake Lagunitas:**
  - Implement W.A.I.T. (Why Am I Talking)
  - Think about the outcome when speaking to the group. Look towards final decisions being made in May.
  - Change the phrase “All income levels in the Bay Area” to “All income levels throughout the Bay Area.”
- **Table – Kent Lake:**
  - Implement a three-vote system.
  - Provide more information on the Brown Act, particularly on how HMC members can communicate amongst themselves.
  - Ensure all tech is working properly at meetings.
- **Table – Lake Sonoma:**
  - Accepted six of the seven draft norms.
  - All cell phones should be on silent.
  - Focus on the meeting and avoid monitoring emails.
  - Be concise in questions and comments.
  - Consider when and how to comment at meetings – whether in the meeting or afterwards by email.
  - Alter draft norm #6 in regards to timing to review materials. This group noted that with three business days to review, several members with varying viewpoints may submit multi-page comments on materials, resulting in a lengthy packet of things for members to review. This group suggested that it would be better for concerns and comments to be expressed directly at meetings, rather than debated via emailed memos.

#### **Public Comment:**

- **Tim Frank, Center for Sustainable Neighborhoods.** Commented that sustainability and labor are at the center of all of these issues discussed at the HMC meetings. Noted that there is not a representative actively engaged in labor on the HMC.

#### **5. Election of Housing Methodology Committee Chairperson – Brad Paul**

- **Nomination:** Jesse Arreguín (Mayor of Berkeley)
- **Objections:** None.
- **Abstentions:** Megan Kirkeby from HCD.



## 6. Visioning Housing Goals for the Bay Area – All

### Report Outs – Housing Goals:

- **Table – Quarry Lake:**

- People should be able to live where and how they want – all types of housing, families etc.
- Numbers should result in units being built by maximizing housing laws.
- Reduce inequalities in government funding and climate impacts.

- **Table – Lake Chabot:**

- Come up with a RHNA methodology that has universal support that makes sense and is fair and equitable.
- Equitable distribution of housing in the region.
- Choices for all so all communities have opportunities for access to transit, jobs, and a livable wage.
- More regional thinking.

- **Table – Felt Lake:**

- Job to Housing Balance – between wages and housing affordability. Try to prioritize this relationship – is this done city by city, or by radius of where these jobs are created?
- Responsibility for housing may be at the city-level because that is where approvals for commercial spaces and housing happen. Are there mechanisms to expand commercial space with housing?
- Should there be average commute goals to achieve allocations (distance or time)?
- Should proximity to jobs be a higher priority than PDAs? Don't abandon but modify PDA.
- Get higher paying jobs into expensive suburbs or development opportunities.
- Do all cities have space to accept more housing? Or is the region reaching capacity?

- **Table – Lake Merced:**

- Have people and communities satisfied with the final conclusion, and feel that people are heard. This includes people in this group, and those who are not.
- Ensure outcomes are realistic and consider what is feasible to build given construction costs.
- Think holistically: about sustainability, health, equity, and greenhouse gas reductions.
- Outcomes will reflect the diversity in the region and take into consideration job deserts and unaffordable areas.
- Outcomes will be equitable and sustainable (greenhouse gas reductions).
- Address jobs and housing balance.
- Support transit corridors.



- **Table – Lake Lagunitas:**

- Better racial and economic equity.
- Be able to see what the factors do for racial/social equity. Perhaps this may mean testing outcomes.
- Make sure RHNA is a useful tool.
- Explore other ways to meet affordability other than density. Think about density that doesn't lead to sprawl.
- Open opportunities to live in high-resource areas.
- Make sure everyone has a place to live. Address homelessness and fixed incomes.

- **Table – Kent Lake:**

- Transparency and ease of understanding for the ultimate methodology. Make sure we help communicate it to people affected.
- Social Equity.
- Make sure we are realistic, but also challenge our notions of what is realistic.
- Stay informed by implementation.
- Connecting to the people that are impacted.

- **Table – Lake Sonoma:**

- Create housing stability for all income levels that benefits the region as a whole.
- Place housing in the right locations – proximity to jobs and transit.
- Use this process as an opportunity to communicate and educate the magnitude of the need for housing.

**HMC Member Comments/Questions:**

- **Brown:** Noted that no one talked about housing for homeless in their goals.
- **Kirkeby:** Reiterated that goals should refer to furthering statutory objectives.

**Public Comment:**

N/A

**7. Wrap Up – Gillian Adams**

**HMC Member Comments/Questions:**

- **Kirkeby:** Shared that she was happy to be part of today's meeting and play a role in the process, and felt the meeting was a great example of robust engagement. She clarified that her role on the HMC is not to steer methodology in any particular direction, but to support in aligning the proposed and draft methodologies with the RHNA statutory objectives. She acknowledged that HCD recognizes there are a lot of changes to accommodate in this cycle, and that this cycle will have robust RHNA numbers. She stated there was a lot of great legislation passed recently that provides a lot of resources and grants for local governments. She stated specifically that in this last budget round there were \$250 million available for local governments to develop housing elements,



and that ABAG will receive funds to help jurisdictions do the hard work to meet these RHNA numbers and objectives.

- **Levin:** Commented that he was encouraged about the comments about racial equity from the group during discussion. He noted that as smart and dedicated as the members of the HMC are, they not entirely reflective of the population of the Bay Area. He expressed that the HMC needs to take this into account as they do their work.

## 8. Public Comment

- **Dave Corey, Marin Housing Solutions:** Stated that representation is critical, and that the HMC is planning with people, not for people. He urged that the group go back to communities who are underrepresented and get their input. He also noted AB 686 is a milestone, and that he is seeing evidence of it in RHNA criteria and goals, but that it would be useful if this group was given an overview or deep dive of what the implementation process will be and the criteria moving forward. He stated that AB 686 grabbed the federal regulations that were adopted by HUD in 2015 and brought the Fair Housing Act up to date. Stated that is a new world, and that all cities must plan for fair housing. He closed his remarks noting that this project everyone is working on is the groundwork for that.
- **Aaron Eckhouse, California YIMBY:** Requested that it remain front of mind that the Bay Area is undergoing a housing crisis causing harm to our residents. He stated that outcomes from RHNA have contributed to this crisis at times. He urged the HMC to correct these mistakes this time around with realistic allocations and with strong regulations in place. He asked the group to consider ways to stop overcrowding, further fair housing, and lower green houses.
- **Corey Smith, Bay Area Affordable Housing Advocacy Coalition:** Stated that there is a crisis which all Bay Area residents are facing, and asked the HMC to take bold action. He urged that trying to make sure every little thing is checked off during this process will not get us out of the emergency.

## 9. Feedback on Today's Meeting and What to Expect at the Next Meeting

## 10. Adjournment / Next Meeting

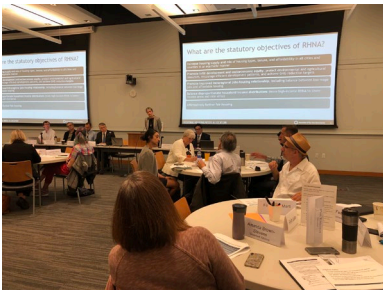
### Tasks Identified for ABAG Staff

- **(Eklund)** Requested a briefing on the methodology used during the last RHNA cycle, noting that a number of concepts from Plan Bay Area were integrated into the last cycle's work.
- **(Brown)** Requested email notifications of member-submitted questions so they are not duplicated. Also suggested an internal email list where members can have conversations before meetings.



- **(Fierce)** Requested a briefing on how the Brown Act applies to HMC members at the next meeting.
- **(Eklund)** Requested that a schedule of future meetings be sent to members in an email.

## Meeting Photos







TO: Housing Methodology Committee

DATE: November 1, 2019

FR: Deputy Executive Director, Policy

RE: HMC Member Correspondence

## Overview

During their October 18 meeting, HMC members were provided a contact email ([rhna@thecivicedge.com](mailto:rhna@thecivicedge.com)) to send comments and questions directly to ABAG staff. This memo provides an overview of the correspondence received since the October 18 meeting.

## HMC Member Correspondence

### 1. Matt Regan 10/18/19: how do we ensure RHNA methodology creates housing goals that are actually buildable?

Hi Gillian,

I forgot to take down the email address for follow up comments so my apologies at clogging up your inbox right after we promised not to!

This is not explicitly mentioned in the statute but I hope everyone can agree that its implicit. While we strive to achieve the admirable goals of housing/jobs balance, affordability, socioeconomic equity, environmental protection etc. we must never forget that the principal goal of this process is to create a methodology that ensures the greatest potential for the RHNA process to succeed...i.e. that the homes actually get built. The principal determination as to whether a housing development goes forward or not is economic; does it pencil, can it be built and rented/sold with a modest/acceptable profit for the developer. 95% of California's housing stock was built by a for profit developer, if there's no profit, there's no housing.

I hope we can create some sort of economic filter, or review process, that makes sure that what we are proposing at the very least passes the laugh test for those who will eventually have to build the homes we are planning for. We cannot propose high RHNA numbers for places where the market cannot support them or where there is no desire to build them, nor should we propose lower numbers for areas where there is a great deal of demand and desire to build simply because doing so fulfills a secondary or tertiary objective such as income balancing or GHG reduction.

Our abiding objective should be creating a methodology that has the greatest chance of succeeding. I have no desire to participate in a 6 month academic exercise where everyone puts on paper their dream vision of the Bay Area that has no basis in reality and no chance of working.

Thanks!!

Matt

**2. Bob Planthold 10/20/19: could we have an update on where the population increase numbers come from?**

Buried in this story is the statement that there will be 4 MILLION more people in Bay Area by 2040.

Those stats. seem relevant to planning housing allocation.

Yet, there is no source for that population estimate.

Can population estimates, for the next generation of Bay Area residents, be relevant to the RHMC considerations? If so, can someone research the basis for the 4 million estimate in the story?

<https://www.sfexaminer.com/news/bart-looking-west-toward-geary-boulevard-in-transbay-crossing-study/>

Bob Planthold

**3. Bob Planthold 10/21/19: sharing resources**

In case this podcast offers any insights, for either staff or the RHMC members.

<https://calmatters.org/housing/2019/10/podcast-case-for-local-housing-control-california-marin-county/>

Bob Planthold

**4. Bob Planthold 10/24/19: sharing resources**

Folks,

This is labelled 'affordable housing', but as A.M.I. increases, so does the rents --even though many in this seniors' complex are on fixed incomes.

The story mentions how A.M.I. went up FIFTEEN % --far more than any C.O.L.A. for a Social Security pension.

<https://sanfrancisco.cbslocal.com/2019/10/23/low-income-seniors-at-risk-of-homelessness-in-novato/>

So, if RHNA allocation is simply & solely based on income, then more and more renters on fixed income will get forced out --and move farther away.

Yet, is important for seniors to maintain their social networks.

Being forced to move disrupts that, making for social mal-adjustment.

Bob Planthold

## **5. Mathew Walsh 10/29/19: discussion format**

What are your thoughts on how [the HMC meeting last week] turned out? I have a concern that the format will make discussion difficult, with the passing of the microphone around. While providing of comments should be ok, discussion will be tough, unless ABAG staff plays a very active role. With past HMCs, we sat around a large table and talked, with ABAG actively facilitating. It worked quite well I thought. I know this is a larger group, so maybe that impacts how we go about it.

Matt

## **6. Bob Planthold 10/29/19: sharing resources**

Another detailed story, about the great imbalance between producing jobs and NOT producing housing.

If RHNA based on income, then what effect does massive imbalance between job production and housing production, such as in this story, become relevant?

[https://www.bizjournals.com/sanjose/news/2019/10/24/why-is-the-peninsula-so-afraid-of-housing.amp.html?\\_twitter\\_impression=true](https://www.bizjournals.com/sanjose/news/2019/10/24/why-is-the-peninsula-so-afraid-of-housing.amp.html?_twitter_impression=true)

Bob Planthold

## **7. Bob Planthold 10/29/19: sharing resources**

A broader, Bay Area story about the resistance to providing more / newer housing.

<http://beyondchron.org/san-francisco-forgets-housing-lessons-of-dot-com-boom/>

Bob Planthold





# WELCOME

ABAG Housing  
Methodology Committee  
November 14, 2019





# PUBLIC COMMENT

ABAG Housing  
Methodology Committee  
November 14, 2019





# INTRODUCTIONS (TAKE 2)

ABAG Housing  
Methodology Committee  
November 14, 2019





# HMC DECISION MAKING PROCESS

ABAG Housing  
Methodology Committee  
November 14, 2019

# Decision-Making Process Proposed Last Month

- Decision is called, HMC members show “fist of five”:
  - No fists: decision passes, even with lots of 1’s and 2’s
  - Five or more fists: decision is blocked - more discussion needed
  - If you block a decision, you take on responsibility to find a solution
  - Anyone can “stand aside” on any decision
  - We can vote where majority +1 prevails (out of 5 digits possible x number of members present)
- ABAG staff can weigh in - and “block” - potential decisions before they are made

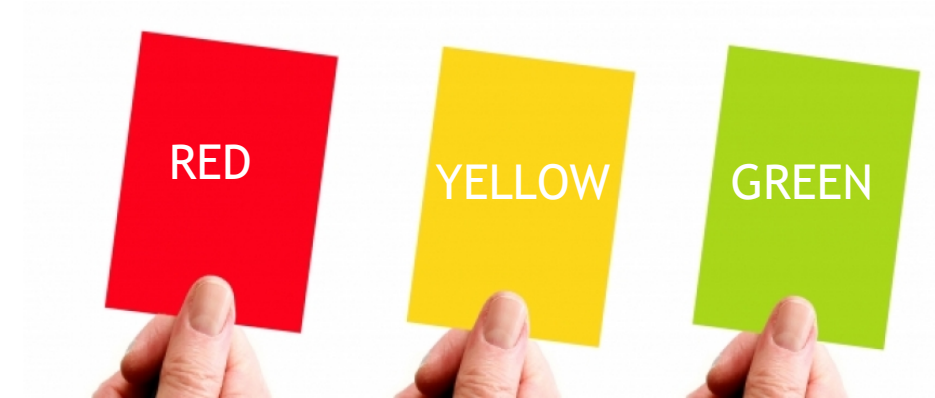


# Recap of HMC Discussion and Feedback

- Members were generally in favor of a discussion-centered decision-making framework.
- Members shared that the “fist of five” voting technique was unnecessarily complicated and should be simplified.
- Members expressed a preference for a decision-making framework that would require conversation in cases where a significant number of members were opposed to or not enthusiastic about a decision.
- Members proposed a simplified voting technique with three options. For example, “I can’t live with it,” “I can live with it,” and “I love it.”

# Review Updated Decision-Making Process

- For a decision to pass, a majority of green cards with up to nine red cards visible
- Nine or more red cards: decision is paused - more discussion needed
- Fewer than nine red cards but more yellow than green: decision is paused - more discussion needed
- If you vote to pause a decision, you take on responsibility to find a solution
- Anyone can “stand aside” on any decision
- ABAG staff can weigh in - and defer - potential decisions before they are made



# HMC Discussion

- Comments?





# HMC NORMS

ABAG Housing  
Methodology Committee  
November 14, 2019



# Draft HMC Norms Proposed Last Month

- We will focus our discussions on how best to increase housing for all income levels in the Bay Area.
- We will remain professional and respectful in all of our interactions.
- We will use our time together wisely, arriving prepared by reading the packet materials shared ahead of each meeting.
- We will prioritize a thoughtful, robust process that makes transparent the “how” and “why” of our path towards recommendations.
- We will use the modified consensus and “fist of five” decision making tools.
- If interested, we will ask any “blocking,” “stand aside,” or 1’s and 2’s to share written thoughts within 3 business days to be included in the HMC meeting notes.
- We will share ideas or comments about the methodology with the entire group rather than directing them solely to ABAG staff.

# Recap of HMC Discussion and Feedback

- Modifications suggested:
  - Focus on developing a regionally beneficial methodology that will increase housing for all income levels
  - Engage in respectful discussions
  - Further modify the proposed modified consensus decision making framework

# Recap of HMC Discussion and Feedback

- Additions suggested:
  - Actively encourage participation by all members
  - Streamline meeting logistics
  - Share materials with members as early as possible

# ABAG Staff Input

- Using placards for indicating comments may be challenging for the facilitator - let's try it and reserve the right to go back to raising hands
- Going over on our allotted time day-of may not be feasible - can we extend ahead of time?

# Review Updated Norms

- We will focus our discussions on developing a regionally beneficial methodology to increase housing for all income levels and areas throughout the Bay Area.
- We will remain professional and respectful in all of our interactions.
- We will use our time together wisely, arriving prepared by reading the packet materials shared ahead of each meeting.
- We will prioritize a thoughtful, robust process that makes transparent the “how” and “why” of our path towards recommendations.
- We will use a modified consensus, three-card decision making tool.
- If interested, we will ask HMC members showing “red,” cards or “standing aside” to share written thoughts within 3 business days to be included in the HMC meeting notes.
- We will share ideas or comments about the methodology with the entire group rather than directing them solely to ABAG staff.
- We will actively encourage participation by all members of the HMC by limiting our comments if others have not yet had a chance to speak and implementing W.A.I.T. (Why Am I Talking). Additionally, we will ask ABAG staff and facilitators to identify the proper times for questions and comments to encourage active participation by all HMC members.
- We will support streamlining meeting logistics by silencing cell phones and limiting distractions. Additionally, we will ask ABAG staff to ensure technology works.
- We will ask ABAG staff to make every effort to give members time to gather feedback from constituents before meetings by sharing packets at least one week in advance when possible and no less than three days prior to a meeting.
- We will think regionally and bring the voices of those who are not present to our conversations.

# HMC Discussion

- Comments?
- Let's use the decision-making process





# BROWN ACT REQUIREMENTS

ABAG Housing  
Methodology Committee  
November 14, 2019



# Brown Act Requirements

- Discussion Outside HMC Meetings
  - HMC Members should not discuss the information with other HMC Members in between meetings
  - HMC Members should not discuss topics that will be under consideration by the HMC amongst themselves in between meetings
  - ABAG staff may provide information to HMC Members in between meetings
- Schedule for Providing Materials
  - The Brown Act provides that meeting agendas be posted at least 72 hours before the meeting
  - Agency practice for ABAG and MTC has been to post the agenda and make the packet available to committee members approximately one week before a meeting, but this is not a requirement of the Brown Act
- Public Comment
  - The public should have a chance to comment during the consideration of each item on the agenda



# PUBLIC COMMENT

ABAG Housing  
Methodology Committee  
November 14, 2019



# PANEL DISCUSSION

ABAG Housing  
Methodology Committee  
November 14, 2019





# PUBLIC COMMENT

ABAG Housing  
Methodology Committee  
November 14, 2019





# LOCAL JURISDICTION SURVEY

ABAG Housing  
Methodology Committee  
November 14, 2019



# What is the Local Jurisdiction Survey?

- State law mandates that ABAG conduct a survey of its member jurisdictions during the RHNA process
- The survey seeks to gather data on the factors that Housing Element Law requires the HMC to consider
- Recent legislation added new requirement for the survey to also include questions related to fair housing issues

# ABAG Priorities for Developing Survey

- Minimize response burden for local jurisdiction staff to increase response rate
  - Avoid asking jurisdictions for publicly accessible and readily available data
  - Focus on factors mandated by statute and most directly impacted by RHNA
  - Support local jurisdictions in their understanding of new Housing Element requirements
- 
- **Schedule:** Draft Survey reviewed by ABAG Regional Planning Committee in December 2019, Final Survey sent to local jurisdictions in January 2020

# Small Group Work

- 10 minutes:
  - Is it clear what we're asking of jurisdictions?
  - Anything missing?
- 10 minutes: report out to group
- Next steps: ABAG staff to consolidate feedback, update survey, and send out to jurisdictions in January; responses due at end of January





# PUBLIC COMMENT

ABAG Housing  
Methodology Committee  
November 14, 2019





# INTRO TO FACTORS VIA HMC'S HOUSING GOALS

ABAG Housing  
Methodology Committee  
November 14, 2019



# Summary of HMC Housing Goals

1. Emphasize benefits to the region as a whole
2. Ensure transparency and ease of understanding, make sure people feel heard
3. Get more units built: make sure everyone has a place to live
4. Further social and racial equity
5. Create choices for all, so all communities have access to opportunities
6. Further the jobs-housing fit
7. Use this process as an opportunity to communicate the magnitude of the need for housing

# Understanding a RHNA Methodology

- Encourages a pattern of housing growth for the Bay Area
- Based on relative relationships among jurisdictions
  - For example, if factor related to jobs, a jurisdiction with more jobs gets more units; a jurisdiction with fewer jobs gets fewer units
- Does not include specific policies or address housing needs of population groups
- Allocation is to jurisdiction as a whole - not specific locations
  - Methodology can include factors related to a type of geography (e.g., near transit) but allocation cannot mandate that jurisdiction zone for housing there
- Local housing element: choose sites to zone for housing, select policies to meet local housing needs

# Discussion: Sample Factors

- Proximity to transit
- Proximity to jobs
- Access to high resource neighborhoods
- Jobs-housing balance
- Jobs-housing fit



# PUBLIC COMMENT

ABAG Housing  
Methodology Committee  
November 14, 2019





# WRAP UP AND NEXT STEPS

ABAG Housing  
Methodology Committee  
November 14, 2019

# Wrap Up + Next Steps

- Feedback on today's meeting
  - Any feedback or ideas to [rhna@thecivicedge.com](mailto:rhna@thecivicedge.com)
- What to expect at Meeting #3 in December
  - Relationship between *Plan Bay Area 2050* and RHNA
  - Refining ideas about methodology factors
  - Initial discussion of subregion shares





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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**File #:** 19-1298      **Version:** 1      **Name:**  
**Type:** Minutes      **Status:** Committee Approval  
**File created:** 11/4/2019      **In control:** ABAG Housing Methodology Committee  
**On agenda:** 11/14/2019      **Final action:**  
**Title:** Approval of ABAG Housing Methodology Committee Minutes of October 18, 2019  
**Sponsors:**  
**Indexes:**  
**Code sections:**  
**Attachments:** [Item 04a Minutes Draft 20191018.pdf](#)

Date	Ver.	Action By	Action	Result
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Approval of ABAG Housing Methodology Committee Minutes of October 18, 2019

Clerk of the Board

Approval



Bay Area Metro Center  
375 Beale Street  
Suite 700  
San Francisco, California

## Meeting Minutes - Draft

### ABAG Housing Methodology Committee

*Chair, Jesse Arreguin, Mayor, City of Berkeley*

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Friday, October 18, 2019

10:00 AM

Yerba Buena - 1st Floor

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#### Association of Bay Area Governments Housing Methodology Committee

The ABAG Housing Methodology Committee may act on any item on the agenda.

The meeting is scheduled to begin at 10:00 a.m.

Agenda, roster, and webcast available at <https://abag.ca.gov>

For information, contact Clerk of the Board at (415) 820-7913.

#### Roster

Josh Abrams, Anita Addison, Jesse Arreguin, Rupinder Bolaria-Shifrin, Rick Bonilla, Michael Brilliot, Monica Brown, Amanda Brown-Stevens, Paul Campos, Ellen Clark, Diane Dillon, Forrest Ebbs, Pat Eklund, Jonathan Fearn, Victoria Fierce, Neysa Fligor, Mindy Gentry, Russell Hancock, Paolo Ikezoe, Welton Jordan, Megan Kirkeby, Brandon Kline, Jeffrey Levin, Fernando Marti, Rodney Nickens, Jr., Julie Pierce, Bob Planthold, Darin Ranelletti, Matt Regan, Jane Riley, Carlos Romero, Elise Semonian, Aarti Shrivastava, Vin Smith, Matt Walsh  
Alternates: Jennifer Carman, Andrew Crabtree, David Feinstein, Noah Housh, Milan Nevjada, John Vasquez

#### 1. Call to Order / Roll Call / Confirm Quorum

Brad Paul convened the meeting at about 10:06 a.m.. Quorum was present.

**Present:** 31 - Abrams, Bolaria-Shifrin, Bonilla, Brilliot, Brown, Brown-Stevens, Campos, Clark, Dillon, Ebbs, Eklund, Fearn, Fierce, Gentry, Ikezoe, Jordan, Kirkeby, Kline, Levin, Marti, Nickens, Pierce, Planthold, Ranelletti, Regan, Riley, Romero, Semonian, Shrivastava, Smith, and Walsh

**Absent:** 4 - Addison, Arreguin, Fligor, and Hancock

#### 2. Welcome

Brad Paul gave the welcome.

2. [19-1190](#) Welcome

**3. Regional Housing Need Allocation Overview**

Gillian Adams gave the staff report.

Arreguin joined the meeting.

The following gave public comment: Shajuti Hossain, Tim Frank.

3. [19-1188](#) Regional Housing Needs Allocation Overview

Discussion on RHNA Background and What is the RHNA Housing Methodology

**4. Housing Methodology Committee Chartering Conversation Overview**

Amber Shipley facilitated the discussion.

The following gave public comment: Tim Frank.

4. [19-1189](#) Housing Methodology Committee Chartering Conversation Overview

Discussion on Why an HMC; HMC Introductions via Poll Everywhere; Roles and Responsibilities; and Proposed Decision-Making Process

**5. Election of Housing Methodology Committee Chairperson**

Brad Paul conducted the election for committee chairperson.

5. [19-1202](#) Election of Housing Methodology Committee Chairperson

The Housing Methodology Committee will vote on the election of a committee chairperson.

**Upon the nomination by Pierce and second by Campos, the Housing Methodology Committee elected Arregun as committee chairperson. The committee chairperson was elected as follows:**

**Aye:** 31 - Abrams, Arreguin, Bolaria-Shifrin, Bonilla, Brilliot, Brown, Brown-Stevens, Campos, Clark, Dillon, Ebbs, Eklund, Fearn, Fierce, Gentry, Ikezoe, Jordan, Kline, Levin, Marti, Nickens, Pierce, Planthold, Ranelletti, Regan, Riley, Romero, Semonian, Shrivastava, Smith, and Walsh

**Absent:** 3 - Addison, Fligor, and Hancock

**Abstain:** 1 - Kirkeby

**Lunch / Break**

## **6. Visioning Housing Goals for the Bay Area**

Amber Shipley facilitated the discussion.

## **7. Public Comment**

The following gave public comment: Dave Coury, Aaron Eckhouse, Corey Smith.

## **8. Feedback on Today's Meeting and What to Expect at the Next Meeting**

Gillian Adams gave the staff report.

## **9. Adjournment / Next Meeting**

Chair Arreguin adjourned the meeting at about 12:45 p.m. The next meeting of the ABAG Housing Methodology Committee is on November 14, 2019, at the Alameda County Transportation Commission, 1111 Broadway, Suite 800, Oakland, California.





# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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<b>File #:</b>	19-1299	<b>Version:</b>	1	<b>Name:</b>	
<b>Type:</b>	Report	<b>Status:</b>		Informational	
<b>File created:</b>	11/4/2019	<b>In control:</b>		ABAG Housing Methodology Committee	
<b>On agenda:</b>	11/14/2019	<b>Final action:</b>			
<b>Title:</b>	Continuation of HMC Chartering Conversation				

The HMC will continue its discussion to finalize the committee's decision making process and norms.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 05a0 Summary Sheet HMC Chartering Revisions.pdf](#)  
[Item 05a1 Attachment A Memo Revised Decision Process for HMC Meetings v2.pdf](#)  
[Item 05a2 Attachment B Memo Revised Norms for HMC Meetings.pdf](#)  
[Item 05a3 Attachment C Tracked Changes Norms for HMC Meetings.pdf](#)  
[Item 05a4 Attachment D Memo Key Brown Act Requirements v4.pdf](#)

Date	Ver.	Action By	Action	Result
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Continuation of HMC Chartering Conversation

The HMC will continue its discussion to finalize the committee's decision making process and norms.

Amber Shipley, Civic Edge Consulting

Information

**Association of Bay Area Governments**

**Housing Methodology Committee**

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**November 14, 2019**

**Agenda Item 5.a.**

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**Continuation of HMC Chartering Conversation**

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**Subject:** The HMC will continue its discussion to finalize the committee's decision making process and norms.

**Background:** The HMC is a key part of ABAG's approach to creating the RHNA allocation methodology. Through the HMC, ABAG staff seek to facilitate dialogue and information sharing in order to enable coordinated action to address the Bay Area's housing challenges.

At the initial meeting of the HMC on October 18, staff engaged committee members in a conversation about a proposed decision-making approach and proposed norms for how the committee will function. HMC members had an opportunity to discuss staff's proposals and provide feedback. Staff will present revisions to the decision-making approach and committee norms, and provide a summary of key requirements of the Brown Act.

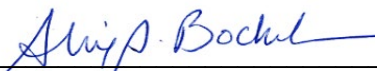
**Issues:** None

**Recommended Action:** Information

**Attachment:**

- A. Memo Revised HMC Decision Making Framework
- B. Memo Revised Norms for HMC Meetings
- C. Tracked Changes Norms for HMC Meetings
- D. Memo Key Brown Act Requirements

**Reviewed:**

  
\_\_\_\_\_  
Alix Bockelman

# REGIONAL HOUSING NEEDS ALLOCATION



TO: Housing Methodology Committee  
FR: Deputy Executive Director, Policy  
RE: Revised HMC Decision Making Framework

DATE: November 7, 2019

## Overview

The Housing Methodology Committee (HMC) has been convened to advise ABAG staff on the RHNA allocation methodology for the 6<sup>th</sup> RHNA cycle (2022-2030), and to ensure the methodology and resulting allocation meet statutory requirements and are consistent with the development pattern included in Plan Bay Area 2050.

The HMC is a key part of ABAG's approach to creating the RHNA allocation methodology. Through the HMC, ABAG staff seek to facilitate dialogue and information sharing in order to enable coordinated action to address the Bay Area's housing challenges.

HMC meetings will be primarily focused on creating space for respectful dialogue and opportunities for those with dissenting opinions to share their perspectives and be heard. That said, some form of group decision making will likely be necessary to move through decision points and arrive at a helpful methodology recommendation for ABAG staff.

This memo provides an overview of the proposed decision-making framework to support the newly convened 6<sup>th</sup> RHNA cycle, including adjustments made in response to feedback provided by HMC members at the October 18 meeting.

## HMC Discussion and Feedback

At their October 18 meeting, HMC members engaged in a robust discussion about the pros and cons of the proposed modified "consensus" decision-making framework.

The following summarizes comments heard from HMC members:

- Members were generally in favor of a discussion-centered decision-making framework.
- Members shared that the "fist of five" voting technique was unnecessarily complicated and should be simplified.
- Members expressed a preference for a decision-making framework that would require conversation in cases where a significant number of members were opposed to or not enthusiastic about a decision.
- Members proposed a simplified voting technique with three options. For example, "I can't live with it," "I can live with it," and "I love it."

During the conversation on October 18, ABAG staff shared that one of staff's priorities is having a way to communicate a range of opinions expressed at HMC meetings when bringing items to the ABAG Regional Planning Committee or ABAG Executive Board for approval.

## **Updated Framework**

ABAG staff incorporated feedback from HMC members to update the proposed decision-making framework. However, staff recommend continuing to use a modified consensus decision-making model, and that is reflected in this proposed update. Given the size of the committee, a process that required full consensus for all decisions would be very time consuming. This modified consensus approach encourages discussion and dialogue to maximize agreement while ensuring that decisions favored by the majority of the group can move forward.

With these adjustments, decision making might look like the following:

- Members will be provided with three cards that they can use to share their feedback visually when a decision point is called:
  - A green card shows you strongly agree or support the decision
  - A yellow card shows you have reservations but are not completely opposed to the decision
  - A red card shows that you strongly disagree or oppose the decision
- For any decision to advance, HMC members will need to show a majority of green cards, with up to nine red cards visible.
- If nine red cards are visible, the decision would be considered paused. More discussion is necessary to arrive at a "consensus" vote where eight or fewer members are requesting the pause. If that is not possible, the facilitator will urge the committee to move on.
- If fewer than nine red cards are visible and there appear to be more yellow cards than green, the decision would be considered paused. More discussion is necessary to arrive at a "consensus" result where the majority of HMC members are in agreement. If that is not possible, the facilitator will urge the committee to move on.
- HMC members who show a red card will take on responsibility for working to find a mutually agreeable solution for the entire group through the discussion that follows the pause vote. This includes contributing ideas to any ensuing discussion that would help them or other colleagues showing red cards move towards a yellow or green card.
- The option to "stand aside" is available to any HMC member who does not consent but is unwilling to take on finding a mutually agreeable solution or does not want to participate in the decision for any reason.
- Cards will be provided with printed words "red," "yellow," and "green" to improve visual accessibility.



**ABAG Staff's Role in Decision Making**

Because the HMC's ultimate goal is a methodology recommendation to ABAG staff, ABAG staff can weigh in on potential decisions before they are made. In particular, this is necessary to ensure there is significant staff bandwidth to accommodate research tasks in advance of the next HMC meeting. ABAG staff can let the HMC know that a request could not be reasonably accommodated, thus deferring action on the potential decision.

# REGIONAL HOUSING NEEDS ALLOCATION



TO: Housing Methodology Committee  
 FR: Deputy Executive Director, Policy  
 RE: HMC Revised Norms Summary Memo

DATE: November 7, 2019

## Overview

The Housing Methodology Committee (HMC) has been convened to advise ABAG staff on the RHNA allocation methodology for the 6<sup>th</sup> RHNA cycle (2022-2030), and to ensure the methodology and resulting allocation meet statutory requirements and are consistent with the development pattern included in Plan Bay Area 2050.

To support the HMC in reaching this challenging goal, committee members worked together to consider a set of draft norms – behavior guidelines that members agree to adhere to during proceedings – at their first meeting on October 18, 2019.

HMC members worked in small groups to react to and provide feedback on the draft norms proposed by ABAG staff, as well as offer additional norms they felt should be considered. The draft norms were:

- We will focus our discussions on how best to increase housing for all income levels in the Bay Area.
- We will remain professional and respectful in all of our interactions.
- We will use our time together wisely, arriving prepared by reading the packet materials shared ahead of each meeting.
- We will prioritize a thoughtful, robust process that makes transparent the “how” and “why” of our path towards recommendations.
- We will use the modified consensus and “fist of five” decision making tools.
- If interested, we will ask any “blocking,” “stand aside,” or 1’s and 2’s to share written thoughts within 3 business days to be included in the HMC meeting notes.
- We will share ideas or comments about the methodology with the entire group rather than directing them solely to ABAG staff.

## HMC Discussion and Feedback

In small groups, HMC members spent approximately 20 minutes reviewing the draft norms and brainstorming new ones to support the flow of their future meetings. Following small group discussions, HMC members shared their feedback via a report-out to the entire group.

Several modifications were suggested to the seven draft norms which HMC members evaluated. Suggested updates fell into the following categories:

- **Focus on developing a regionally beneficial methodology that will increase housing for all income levels**

Comments included:

- Focus discussions on a fair methodology for all levels of income in the Bay Area during meetings.
- Be mindful about how decisions will affect the region when voting.
- Increase housing in all income areas.

- **Engage in respectful discussions**

Comments included:

- Respect facilitators.
- Limit interruption of the speakers while they are mid-presentation.
- Be concise in questions and comments.

- **Further modify the proposed modified consensus decision making framework**

Comments included:

- Implement a voting method using red, yellow, and green cards.
- Consider when and how to comment at meetings if you block a vote or stand aside; take advantage of the opportunity to clarify your position by email afterwards.
- Revisiting big decisions at future meetings if there is not consensus.

In addition to suggested modifications of the proposed norms, HMC members made the following suggestions for new norms to be considered by the group:

- **Actively encourage participation by all members**

Comments included:

- Make sure everyone gets to speak once before you speak twice.
- If you have not spoken yet, try to speak up.
- Implement W.A.I.T. (Why Am I Talking?).
- Think about your desired outcome when speaking to the group and how your comments will support final decisions being made in May.
- Be sure participation is equitable among members and identify appropriate times for questions and comments.

- **Streamline meeting logistics**

Comments included:

- Use standing up name placards to indicate a comment, rather than raising hands to speak.
- All cell phones should be on silent.
- Focus on the meeting and avoid monitoring emails.
- Ensure all tech is working properly at meetings.
- If meetings need to go over time, the HMC should take a vote as a group to determine if the meeting will continue or adjourn.

- **Share materials with members as early as possible**

Comments included:

- Share materials early enough to allow for feedback from constituents prior to meetings – ideally one week, but no less than three days before meetings.

### **ABAG Staff Responses**

After reviewing the suggested modifications and additions to the draft norms, ABAG staff has offered feedback on two of the suggestions related to streamlining meeting logistics:

- First, the suggestion to use placards to indicate comments as opposed to raising hands to speak may prove challenging for the facilitators depending on the room set-up and their line of sight. Staff are open to trying this but would like to reserve the right to transition back to hand-raising if it proves too challenging for facilitators.
- Second, the suggestions to continue discussions beyond the allotted meeting time may not be feasible for many HMC members, and thus pose a challenge to same-day meeting extensions proposals. Staff suggest meetings be extended ahead of time whenever possible.

### **Proposed Updated Norms**

Based on HMC member comments and conversation on the norms, staff propose updated norms to guide the HMC's work:

- We will focus our discussions on developing a regionally beneficial methodology to increase housing for all income levels and areas throughout the Bay Area.
- We will remain professional and respectful in all of our interactions.
- We will use our time together wisely, arriving prepared by reading the packet materials shared ahead of each meeting.
- We will prioritize a thoughtful, robust process that makes transparent the "how" and "why" of our path towards recommendations.
- We will use a modified consensus, three-card decision making tool.
- If interested, we will ask HMC members showing "red" cards or "standing aside" to share written thoughts within 3 business days to be included in the HMC meeting notes.
- We will share ideas or comments about the methodology with the entire group rather than directing them solely to ABAG staff.



- We will actively encourage participation by all members of the HMC by limiting our comments if others have not yet had a chance to speak and implementing W.A.I.T. (Why Am I Talking). Additionally, we will ask ABAG staff and facilitators to identify the proper times for questions and comments to encourage active participation by all HMC members.
- We will support streamlining meeting logistics by silencing cell phones and limiting distractions. Additionally, we will ask ABAG staff to ensure technology works.
- We will ask ABAG staff to make every effort to give members time to gather feedback from constituents before meetings by sharing packets at least one week in advance when possible and no less than three days prior to a meeting.
- We will think regionally and bring the voices of those who are not present to our conversations.

The attached memo shows these updated norms with track-changes to show the updates suggested based on feedback from HMC members. In addition, more detailed feedback from each of the groups can be found in the October 18 meeting notes. Staff thanks the HMC members for their thoughtful feedback on how this large committee can best work together.

# REGIONAL HOUSING NEEDS ALLOCATION



Association of Bay Area Governments

TO: Housing Methodology Committee

DATE: November 7, 2019

FR: Deputy Executive Director, Policy

RE: HMC Revised Norms

- We will focus our discussions on ~~how developing a regionally beneficial methodology best~~ to increase housing for all income levels and areas in throughout the Bay Area.
- We will remain professional and respectful in all of our interactions.
- We will use our time together wisely, arriving prepared by reading the packet materials shared ahead of each meeting.
- We will prioritize a thoughtful, robust process that makes transparent the "how" and "why" of our path towards recommendations.
- We will use ~~the a~~ modified consensus, three-card and "fist of five" decision making tools.
- If interested, we will ask ~~any HMC members showing "blocking red" cards or "standing aside," or 1's and 2's~~ to share written thoughts within 3 business days to be included in the HMC meeting notes.
- We will share ideas or comments about the methodology with the entire group rather than directing them solely to ABAG staff.
- We will actively encourage participation by all members of the HMC by limiting our comments if others have not yet had a chance to speak and implementing W.A.I.T. (Why Am I Talking). Additionally, we will ask ABAG staff and facilitators to identify the proper times for questions and comments to encourage active participation by all HMC members.
- We will support streamlining meeting logistics by silencing cell phones and limiting distractions. Additionally, we will ask ABAG staff to ensure technology works.
- We will ask ABAG staff to make every effort to give members time to gather feedback from constituents before meetings by sharing packets at least one week in advance when possible and no less than three days prior to a meeting.
- We will think regionally and bring the voices of those who are not present to our conversations.

## REGIONAL HOUSING NEEDS ALLOCATION



Association of Bay Area Governments

TO: Housing Methodology Committee  
FR: Deputy Executive Director, Policy  
RE: Summary of Key Brown Act Requirements

DATE: November 7, 2019

### Overview

At its October 18, 2019 meeting, members of the Housing Methodology Committee (HMC) requested clarification about how the Brown Act that affects committee deliberations. In particular, committee members were interested in opportunities for facilitating dialogue among members in between HMC meetings. Below is a summary of key provisions of the Brown Act.

### Discussion Outside HMC Meetings

Staff and HMC members should be mindful of discussing items the HMC will consider outside a noticed meeting. Such discussion can be in the form of a “daisy chain” in which Member A shares an opinion with Member B who shares it with Member C until a quorum of the group has shared their opinion on a topic. It can also be in the form of a “hub and spoke” where staff or a member acts as a hub of information and opinions and ends up sharing opinions of various members with a quorum of the group. This prohibition is contained in Cal. Gov’t Code Section 54952.2(b)(1). With this in mind, it is acceptable for ABAG/MTC staff to unilaterally provide information to HMC members in between meetings, but members should not discuss the information with other HMC members in between meetings. HMC members should also be careful not to discuss topics that will be under consideration by the HMC amongst themselves in between meetings to avoid the risk of an unnoticed “serial meeting.”

### Schedule for Providing Materials

The Brown Act provides that meeting agendas be posted in a physical location “freely accessible to members of the public” and posted on the agency’s website at least 72 hours before the meeting. The agenda must also contain a “brief description of each item of business to be transacted or discussed at the meeting.” These requirements are contained in Cal. Gov’t Code Section 54954.2. There is no specific requirement with respect to the meeting packet or memoranda or information related to specific items on the agenda. Agency practice for ABAG and MTC has been to post the agenda and make the packet available to committee members approximately one week before a meeting, but this is not a requirement of the Brown Act.



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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<b>File #:</b>	19-1300	<b>Version:</b>	1	<b>Name:</b>	
<b>Type:</b>	Report	<b>Status:</b>		Informational	
<b>File created:</b>	11/4/2019	<b>In control:</b>		ABAG Housing Methodology Committee	
<b>On agenda:</b>	11/14/2019	<b>Final action:</b>			
<b>Title:</b>	Panel Discussion: Perspectives on Promoting Equity in RHNA				

This panel will provide HMC members with information about the new RHNA objectives and factors related to affirmatively furthering fair housing and jobs-housing fit.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 06a0 Summary Sheet Panel Discussion.pdf](#)  
[Item 06a1 Attachment A Presenter Bios.pdf](#)  
[Item 06a2 Presentation Othering and Belonging v1.pdf](#)

Date	Ver.	Action By	Action	Result
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### Panel Discussion: Perspectives on Promoting Equity in RHNA

This panel will provide HMC members with information about the new RHNA objectives and factors related to affirmatively furthering fair housing and jobs-housing fit.

Gillian Adams, Moderator; Tyrone Buckley, Senior Policy Specialist, California Department of Housing and Community Development (HCD); Sarah Treuhaft, Managing Director, PolicyLink; and Eli Moore, Program Manager, Haas Institute for a Fair and Inclusive Society

### Information



## Association of Bay Area Governments

### Housing Methodology Committee

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November 14, 2019

Agenda Item 6.a.

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#### Panel Discussion: Perspectives on Promoting Equity in RHNA

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**Subject:** This panel will provide HMC members with information about the new RHNA objectives and factors related to affirmatively furthering fair housing and jobs-housing fit.

**Background:** ABAG has convened this panel to provide their ideas and perspectives about affirmatively furthering fair housing and jobs-housing fit to inform the HMC's discussions about options for how to address these outcomes in the allocation methodology.

Panelists include:

**Tyrone Buckley**, Senior Policy Specialist at the California Department of Housing and Community Development (HCD), will discuss the State's work on opportunity mapping. View the 2019 Opportunity Maps or review the methodology to learn more about the purpose of opportunity mapping and the indicators used to create the maps.

- 2019 Opportunity Maps: [https://haasinstitute.berkeley.edu/sites/default/files/mappings/TCAC/opportunity\\_map\\_2019.html](https://haasinstitute.berkeley.edu/sites/default/files/mappings/TCAC/opportunity_map_2019.html)
- Methodology: <https://www.treasurer.ca.gov/ctcac/opportunity/final-opportunity-mapping-methodology.pdf>

**Sarah Treuhaft**, Managing Director at PolicyLink, will discuss the concept of jobs-housing fit and the impacts of the mismatch between the locations of low-wage jobs and affordable housing. Information on equity indicators related to jobs-housing fit in Bay Area jurisdictions is available from the Bay Area Equity Atlas.

- Bay Area Equity Atlas: <https://bayareaequityatlas.org/>

**Association of Bay Area Governments**

**Housing Methodology Committee**

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**November 14, 2019**

**Agenda Item 6.a.**

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**Panel Discussion: Perspectives on Promoting Equity in RHNA**

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**Eli Moore**, Program Manager at the Haas Institute for a Fair and Inclusive Society, will discuss racial segregation patterns in the Bay Area and the impacts of racially exclusionary housing on the current displacement crisis. He recently co-authored a report on this issue, *Roots, Race, & Place*. The Haas Institute has completed additional analysis and research on racial segregation in the Bay Area, and the organization contributed to HCD's opportunity mapping work.


- *Roots, Race, & Place* report:  
<https://haasinstitute.berkeley.edu/rootsraceplace>
- Racial segregation in the Bay Area:  
<https://haasinstitute.berkeley.edu/segregationinthebay>

**Issues:** None

**Recommended Action:** Information

**Attachment:** A. Presenter Bios

**Reviewed:**

  
Alix Bockelman

## REGIONAL HOUSING NEEDS ALLOCATION



Association of Bay Area Governments

### Panelist Bios for Discussion of Perspectives on Promoting Equity in RHNA

#### **Tyrone Buckley**

*Senior Policy Specialist – Fair Housing, California Department of Housing and Community Development*

Tyrone Buckley is a Senior Policy Specialist for the California Department of Housing and Community Development, where he focuses on policies to further fair housing across the state. Prior to this role, Tyrone was the Policy Director for Housing California, an advocacy group working to advance state legislation that increases the supply of permanently affordable homes. He holds a J.D. from the School of Law at the University of California, Davis as well as a master's degree in city and regional planning from Cal Poly.



#### **Sarah Treuhaft**

*Managing Director, PolicyLink National Equity Atlas*

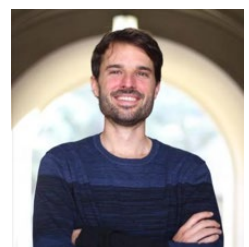
Sarah Treuhaft is a managing director at PolicyLink, overseeing the organization's equitable economy work to advance policy solutions for racial and economic equity, provide local leaders with relevant and actionable data, and build a new narrative about the economic imperative of equity. She also leads the National Equity Atlas research partnership with the USC Program for Environmental and Regional Equity (PERE). Sarah has authored numerous reports on issues of racial economic inclusion and equitable development and has written for publications including *The New York Times*, *Shelterforce*, and *Yes! Magazine*. She holds master's degrees in city planning and international and area studies from the University of California, Berkeley and was a Peace Corps volunteer in Togo, West Africa. She currently serves on the board of the Community Indicators Consortium and the Technical Expert Group for San Francisco's Housing Affordability Strategy. When not immersed in charts or the fine art of crafting good sentences, you may find her at a park with her kindergartner or making recipes from the 101 Cookbooks blog.



#### **Eli Moore**

*Program Manager, Haas Institute for a Fair and Inclusive Society*

Eli Moore is Director of the California Community Partnerships Program at the Haas Institute for a Fair and Inclusive Society. Over the last twenty years, Eli has facilitated numerous participatory action research processes and published various reports and strategy papers that have been cited by local, national, and international media outlets and policy-making bodies. His research focuses broadly on urban planning and policy, political economy, race, and human geography. Eli draws on training and experience with geographic information systems, qualitative and mixed methods research, policy analysis, conflict mediation and negotiation, and popular education to facilitate participatory processes that allow those most affected by injustice to lead decision making and advance transformative change. Originally from the San Francisco Bay Area, Eli holds a bachelor's degree from University of California at Santa Cruz and dual master's degrees in Geography and International Relations from the Syracuse University Maxwell School of Citizenship and Public Affairs.



# Housing Analysis for a Bay Area Where All Belong

DATE

November 14, 2019

PRESENTER

**Eli Moore, Director**  
California Community  
Partnerships Program

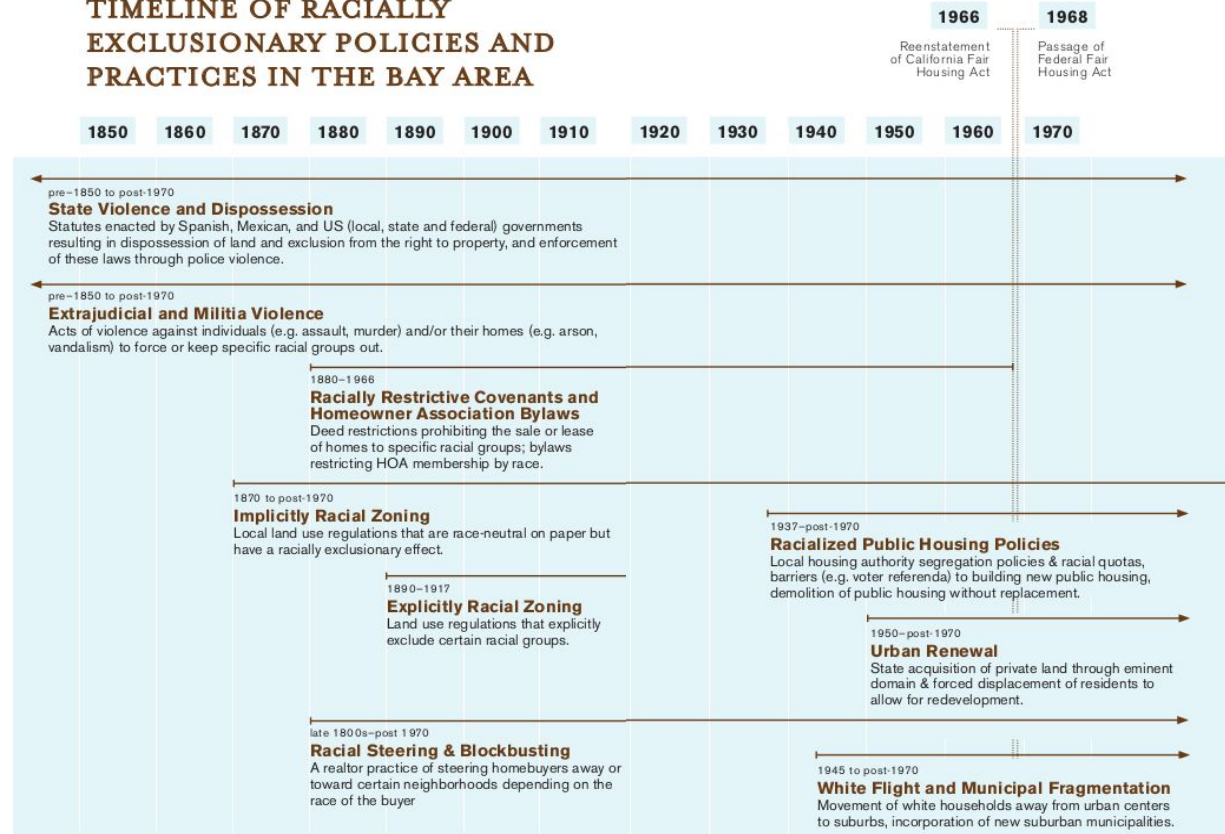
AUTHORIAL SUPPORT

Nicole Montojo



The Othering and Belonging Institute at UC Berkeley  
is a hub of engaged scholars, researchers, strategic  
communicators, policymakers, and community  
partners working to advance belonging for all  
members of society.

# TIMELINE OF RACIALLY EXCLUSIONARY POLICIES AND PRACTICES IN THE BAY AREA



from “Roots, Race, & Place: A History of Racially Exclusionary Housing Policy in the Bay Area,” 2019.

[haasinstitute.berkeley.edu/rootsraceplace](https://haasinstitute.berkeley.edu/rootsraceplace)

1950

A message to  
**EVERY CALIFORNIAN**  
who believes in  
**DEMOCRACY**



*at the  
grass roots!*

**Insist on your  
AMERICAN RIGHT TO VOTE!**

**VOTE YES ON 10**

These facts are important to you ➔

## *The Right to Vote—* **GUARD IT!**

**HERE ARE THE FACTS ON  
PROPOSITION 10—WHAT IT PROVIDES  
— WHY IT IS NECESSARY — HOW IT  
AFFECTS YOU AND YOUR COMMUNITY**

Proposition 10 is undoubtedly the most clear-cut, easily understood measure ever to appear on the California ballot.

It adds a vitally necessary section to the State Constitution: the Public Housing Project Law.

It provides, simply, that any permanent public housing project proposed to be undertaken in whole or in part by the Federal Government or a State public body, must first be approved at an election by a majority of the voters of the city, town or county in which such a project is contemplated.

Proposition 10, naturally, will not in any way interfere with the Federal Government's needed power, in time or war or disaster, to construct temporary emergency housing facilities.

Proposition 10 *will* give the people in local communities the right to decide for themselves if permanent, subsidized housing projects are necessary or desirable for their community.

Proposition 10 is the very essence of American democracy!



In California, there are approximately two million homeowners, a great many of whom are veterans, making real sacrifices for the enjoyment and responsibilities of home ownership. Hundreds of thousands more are planning to become homeowners in the future.

These people must subsidize, through taxes on their homes, the huge expense of civic services provided public housing projects, which are exempt from taxes. Manifestly, it is only just and right that they, along with other citizens, be allowed the right of decision when a project's construction is contemplated.



Under Proposition 10, these facts are indisputable: if a housing project is *not* needed and *not* wanted, it will be turned down by a vote of the people; if a housing project *is* needed and *is* wanted, it will be approved by a vote of the people.

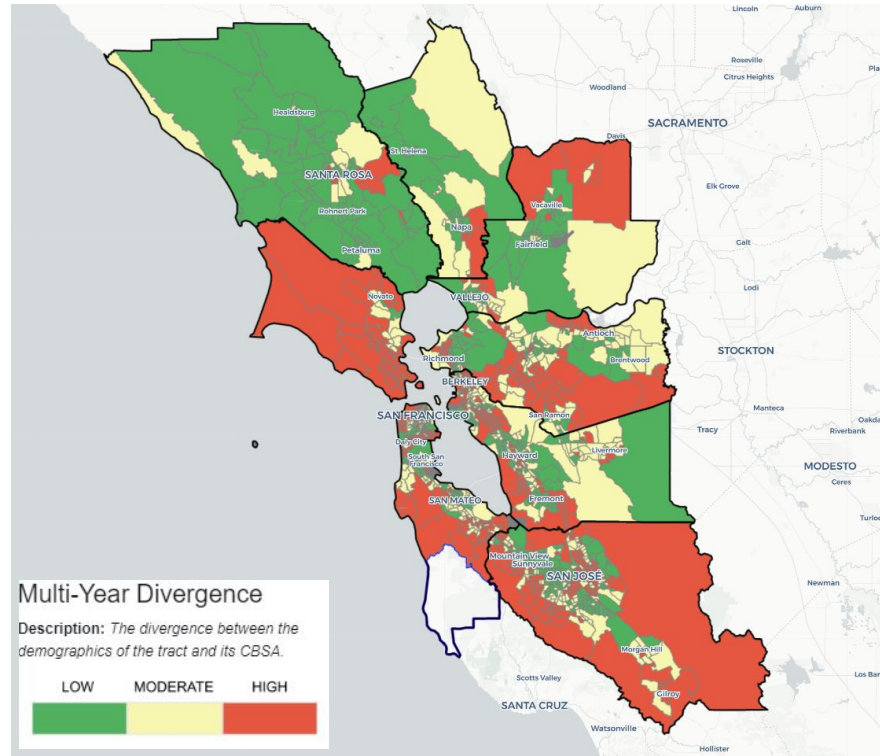
Given democratic opportunity, the people can be depended on to make the right decision in any given case. It is an affront to the citizenry of California to argue otherwise —to contend, as opponents of Proposition 10 have done, that it would be "dangerous" to allow the people of California to vote!

Every true believer in democracy will agree that the right to vote is not a danger—but a cherished blessing!

*Pamphlet from the San Francisco-based Northern California Committee for Home Protection 1950 campaign for Proposition 10 framed its opposition to public housing as a matter of democracy.*

*Source: Liam Dillon, Los Angeles Times*

# Racial Residential Segregation in the Bay Area, 2010

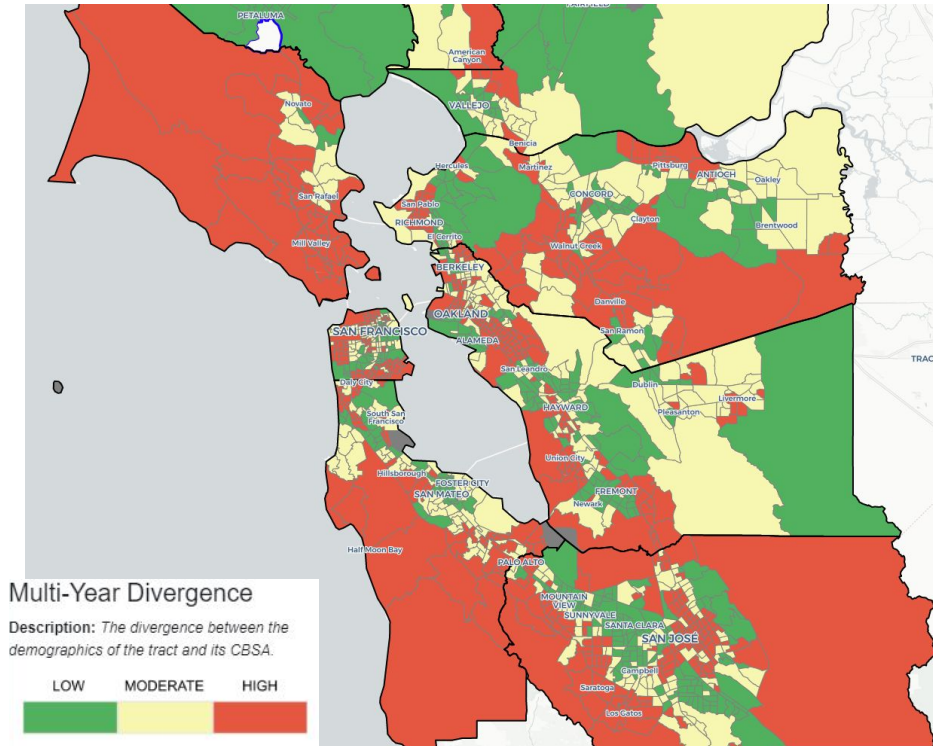


from “**Racial Segregation in the San Francisco Bay Area, Part 3: Measuring Segregation,**” 2019.

[haasinstitute.berkeley.edu/bay-segregation-map](https://haasinstitute.berkeley.edu/bay-segregation-map)



## Racial Residential Segregation in the Bay Area, 2010



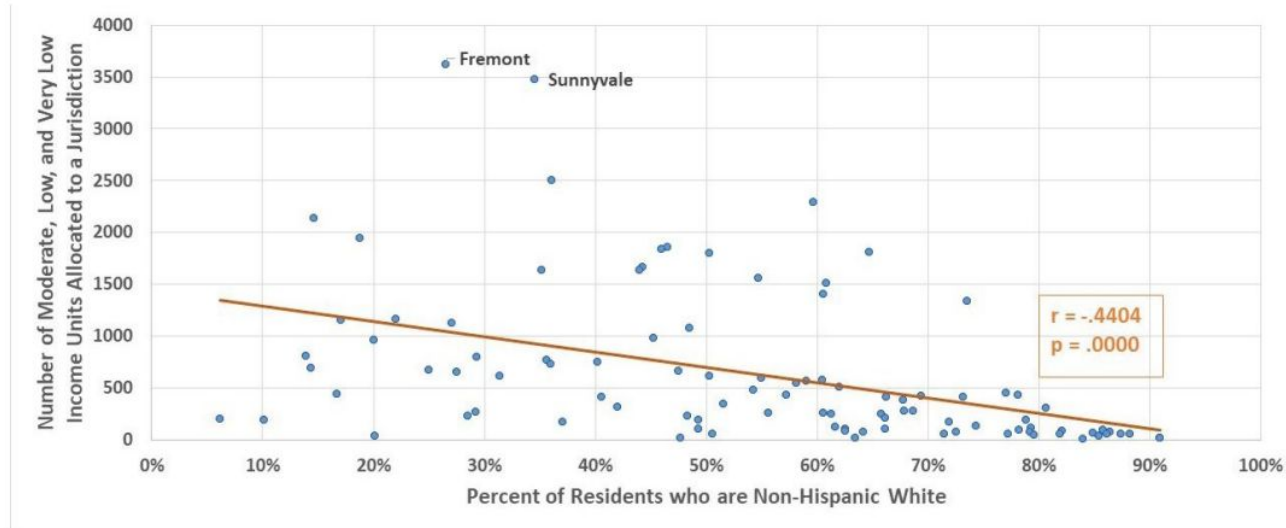
from “**Racial Segregation in the San Francisco Bay Area, Part 3: Measuring Segregation,**” 2019.

[haas.institute.berkeley.edu/bay-segregation-map](https://haas.institute.berkeley.edu/bay-segregation-map)

In past RHNA cycles, local governments with higher percentages of white residents were more likely to have received lower allocations of moderate and lower income housing.

CHART 4

### 5th Cycle Allocations by Race



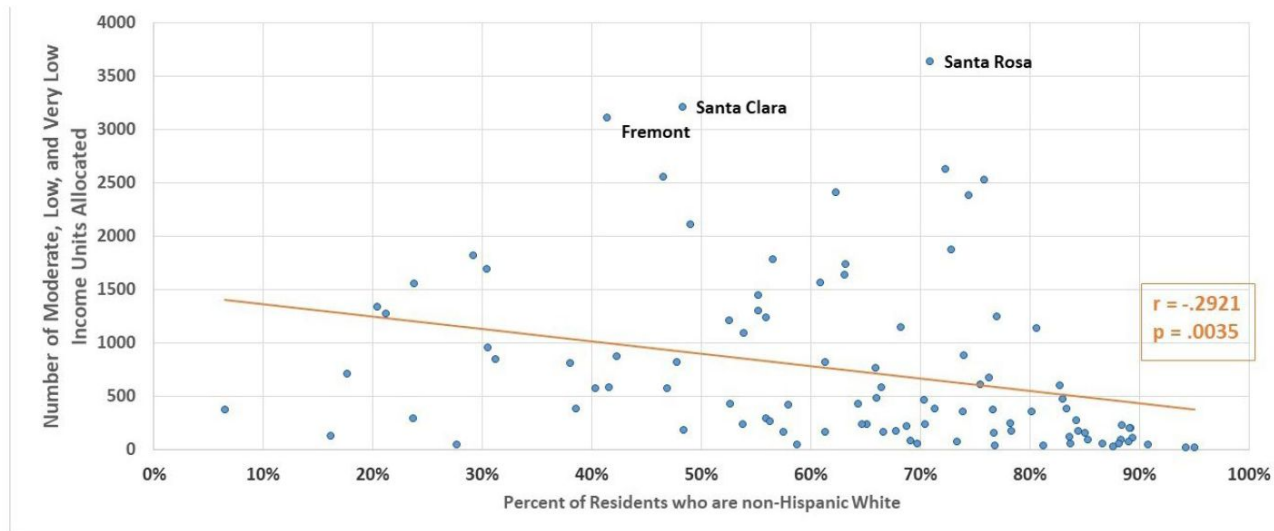
from “Unfair Shares: Racial Disparities and the Regional Housing Needs Allocation Process in the Bay Area,” 2017.

[haasinstitute.berkeley.edu/unfairshares](https://haasinstitute.berkeley.edu/unfairshares)

In past RHNA cycles, local governments with higher percentages of white residents were more likely to have received lower allocations of moderate and lower income housing.

CHART 6

#### 4th Cycle Allocations and Race

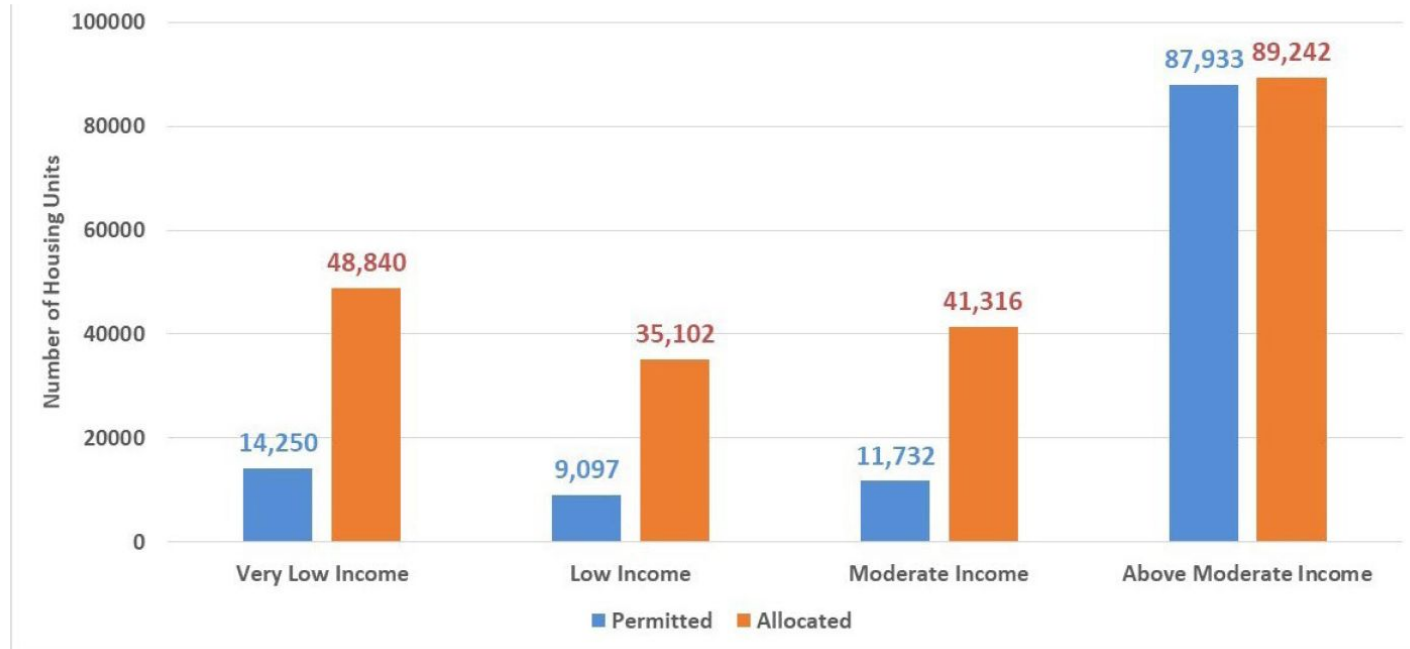


from “Unfair Shares: Racial Disparities and the Regional Housing Needs Allocation Process in the Bay Area,” 2017.

[haas.institute.berkeley.edu/unfairshares](https://haas.institute.berkeley.edu/unfairshares)

CHART 7

### 4th Cycle Units Permitted Relative to Units Allocated (By Income Category)



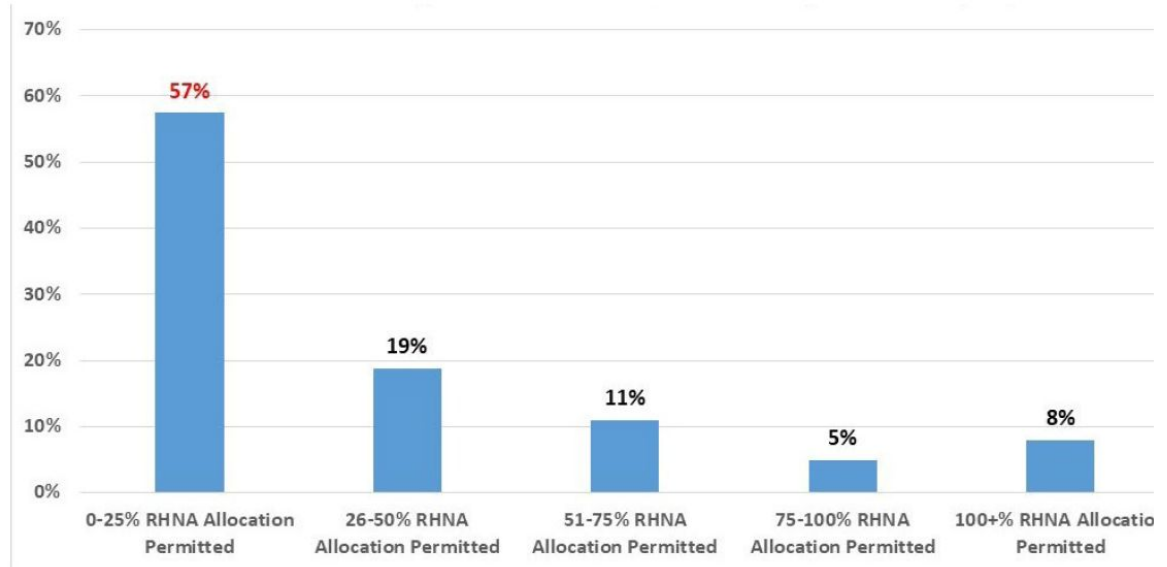
from “Unfair Shares: Racial Disparities and the Regional Housing Needs Allocation Process in the Bay Area,” 2017.

[haasinstitute.berkeley.edu/unfairshares](https://haasinstitute.berkeley.edu/unfairshares)



CHART 9

Percentage of Cities by Level of Allocated Moderate Income and Below Housing Units Permitted 2007–2014 (4th RHNA Cycle)



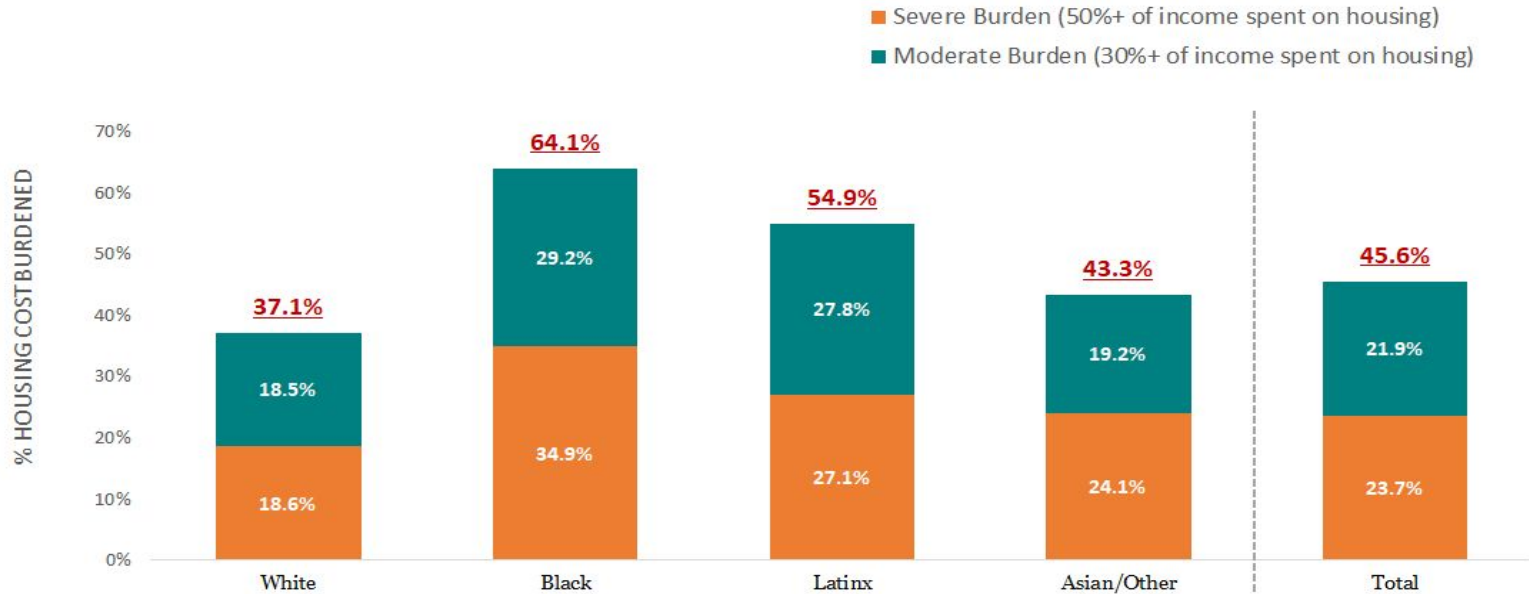
57% of local governments in the Bay Area permitted less than 25% of the total housing units needed for Moderate, Low, and Very Low income households between 2007 and 2014.

from “Unfair Shares: Racial Disparities and the Regional Housing Needs Allocation Process in the Bay Area,” 2017.

[haasinstitute.berkeley.edu/unfairshares](https://haasinstitute.berkeley.edu/unfairshares)

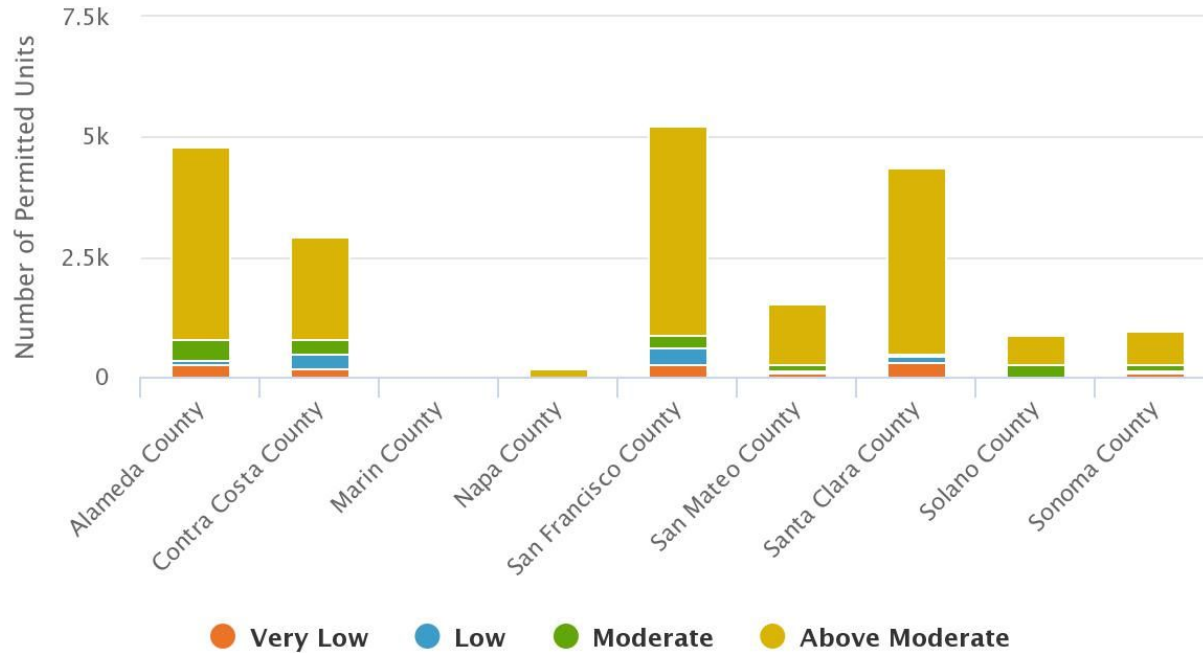
## Renter Housing Cost Burden by Race and Ethnicity

### San Francisco - Oakland - Hayward Metropolitan Area, 2016



Source: Harvard Joint Center for Housing Studies, America's Rental Housing 2017

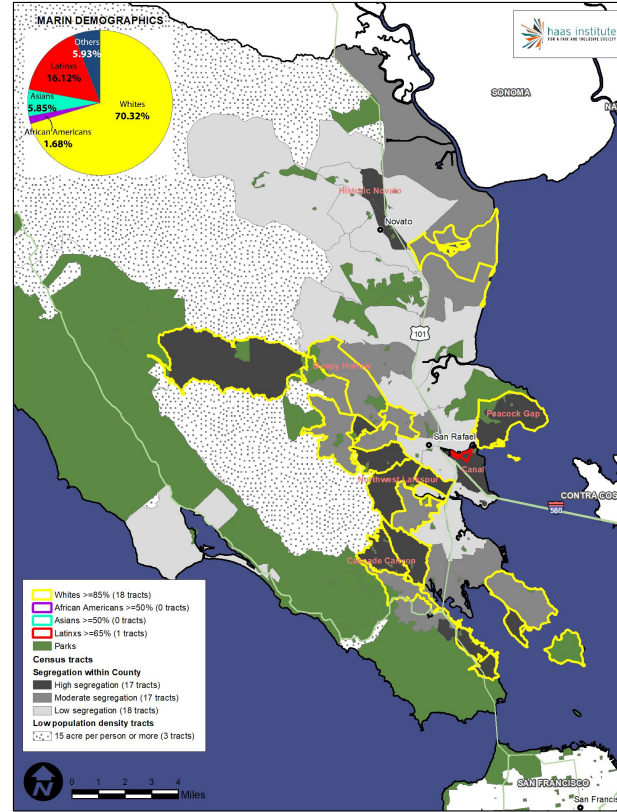
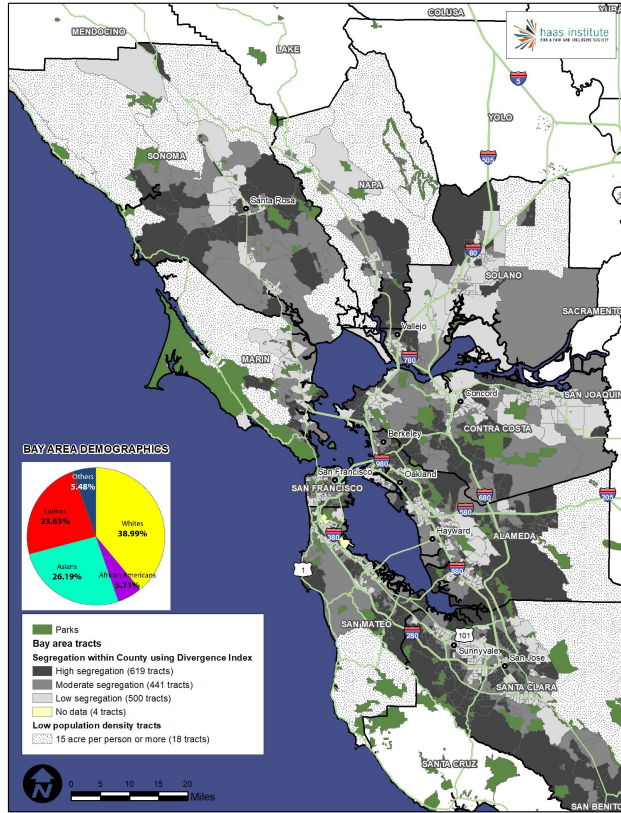
## 2016 Housing Permits by Affordability Level



Highcharts.com

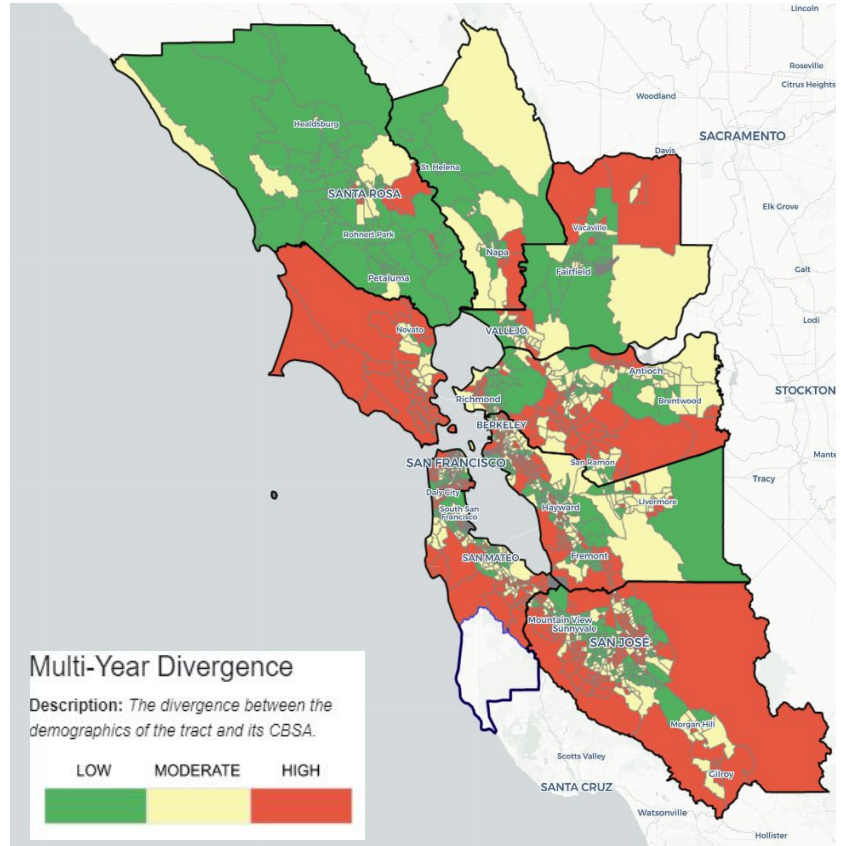
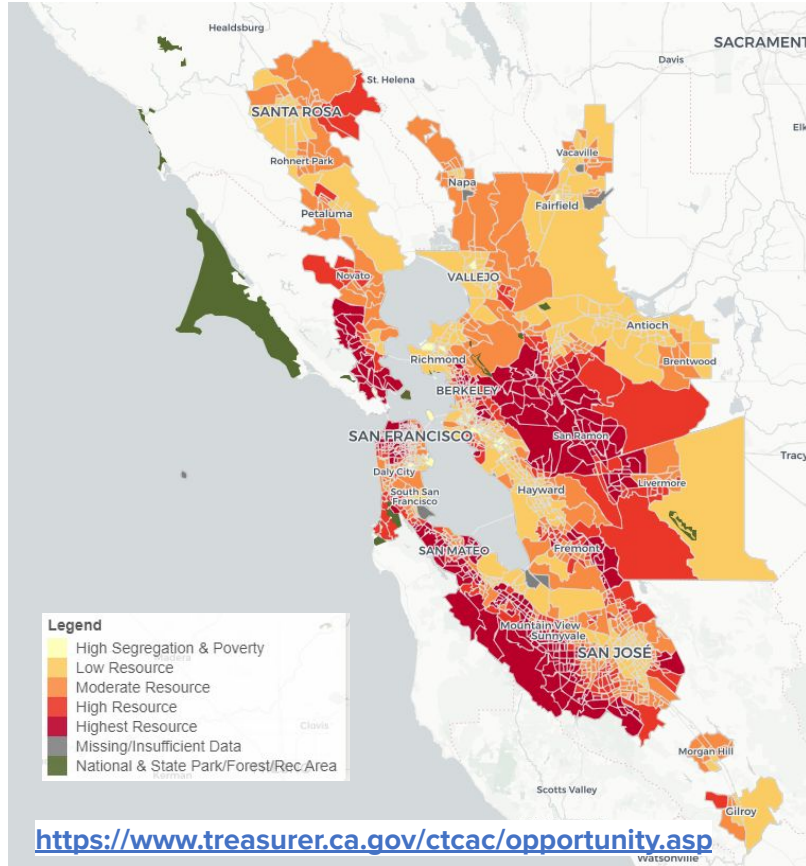
Source: MTC Vital Signs <http://www.vitalsigns.mtc.ca.gov/housing-permits#chart-2>

## Demographics & Segregation in the Bay Area



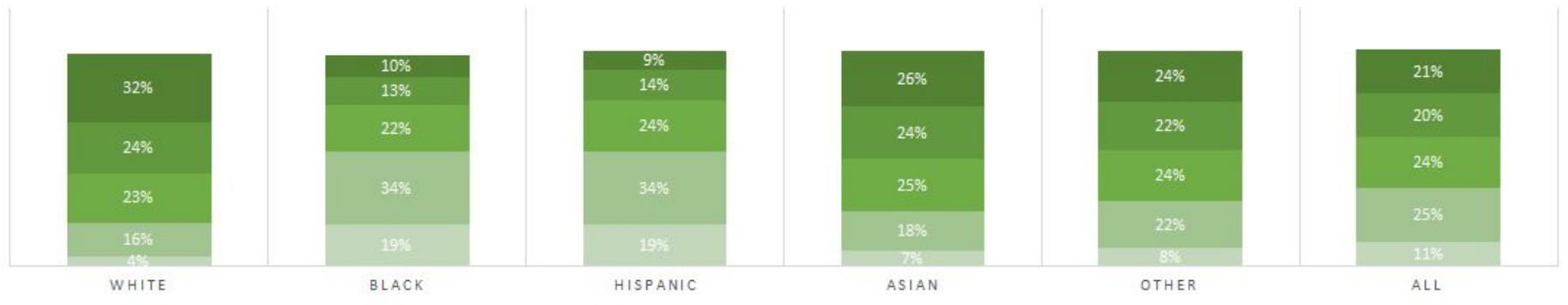


# Opportunity & Segregation



## PERCENTAGE OF RACIAL GROUP IN EACH OPPORTUNITY LEVEL

■ High Segregation & Poverty ■ Low Resource ■ Moderate Resource ■ High Resource ■ Highest Resource



# Eli Moore

Director

California Community Partnerships

[elimoore@berkeley.edu](mailto:elimoore@berkeley.edu)

[belonging.berkeley.edu](https://belonging.berkeley.edu)

# Appendices



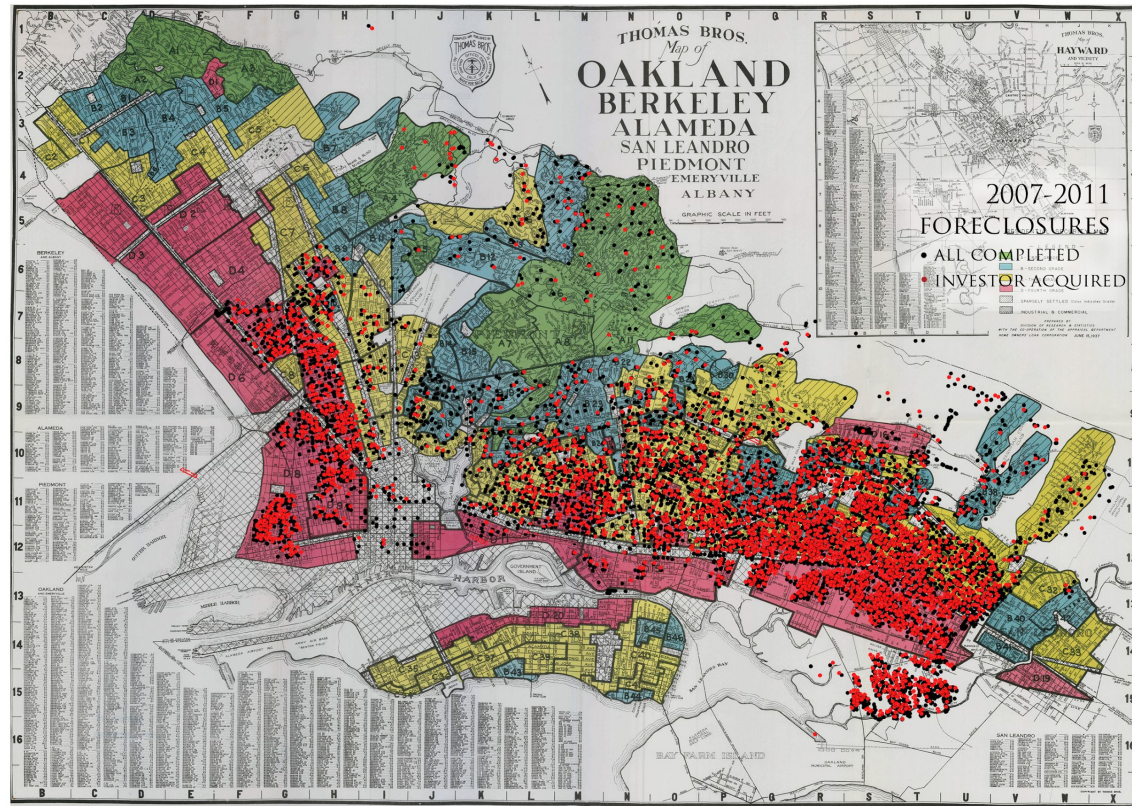
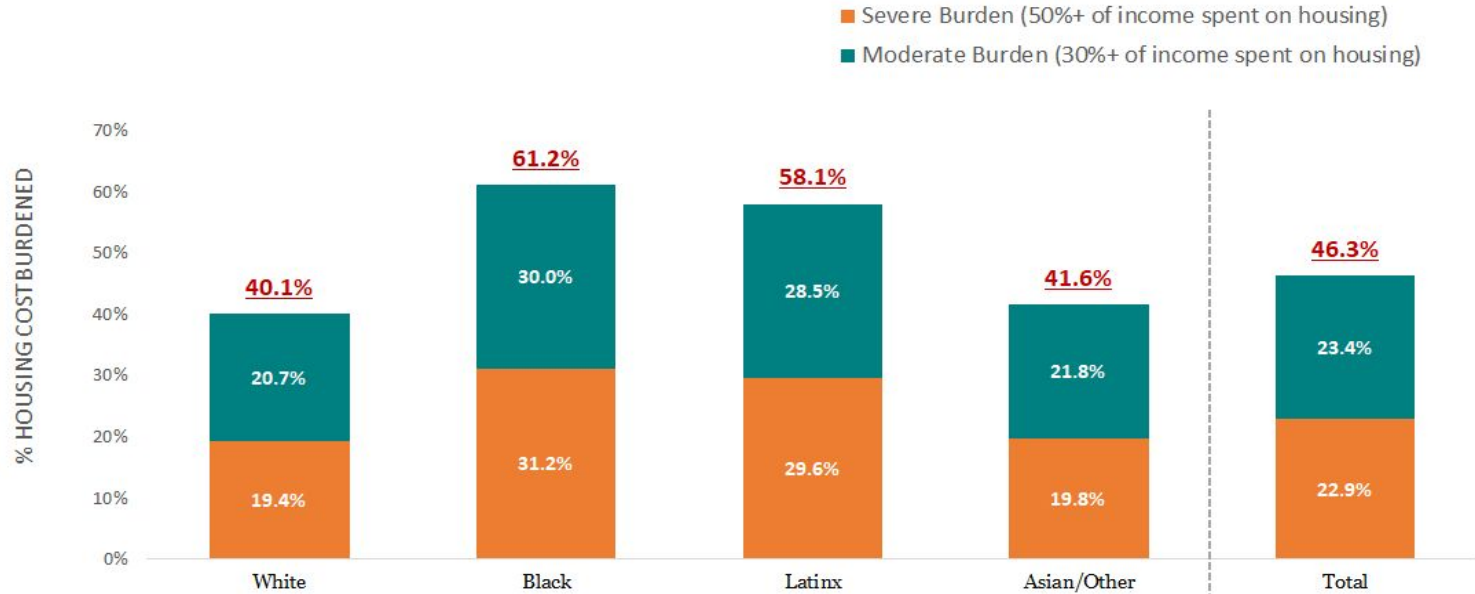


Image by Evan Bissell  
from “**Roots, Race, & Place: A History of Racially Exclusionary Housing Policy in the Bay Area,**” 2019.  
[haasinstitute.berkeley.edu/rootsraceplace](https://haasinstitute.berkeley.edu/rootsraceplace)

## Renter Housing Cost Burden by Race and Ethnicity San Jose - Sunnyvale - Santa Clara Metropolitan Area, 2016

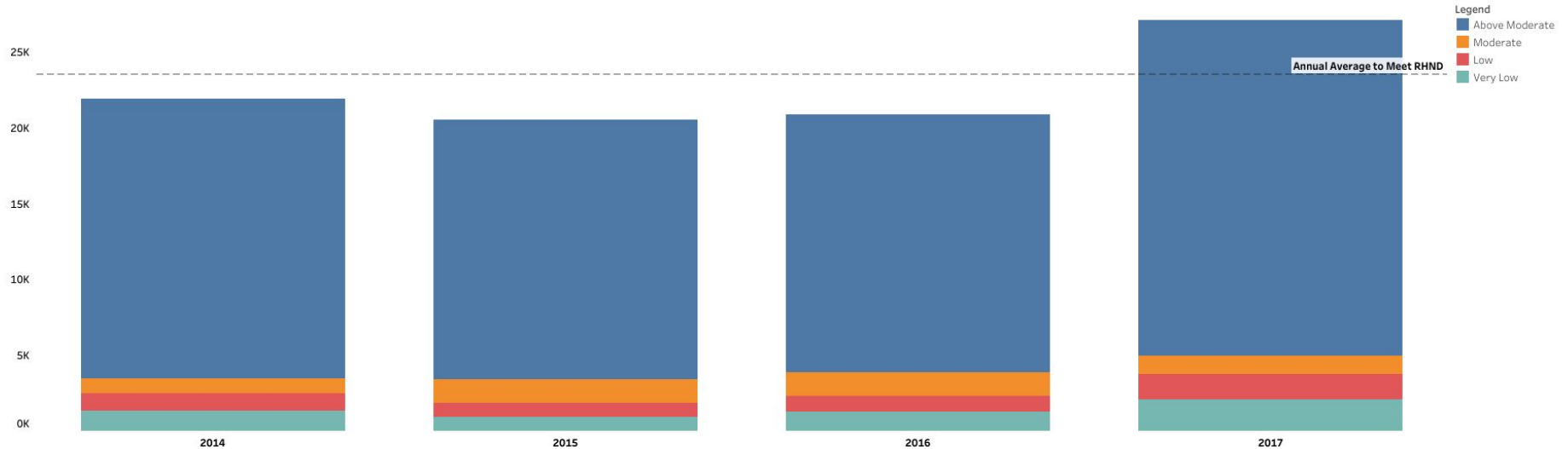


Source: Harvard Joint Center for Housing Studies, America's Rental Housing 2017

# Housing Permit Report

Release Date October 3, 2018

Affordability Production	Affordability Production Shares By Year	Total Units Permitted by Year	Units Permitted In PDAs	Units Permitted In TPAs	Units Permitted In Housing Element Sites	Above Moderate Income Level RHNA Allocation vs. Permitted Units	Moderate Income Level RHNA Allocation vs. Permitted Units	Low Income Level RHNA Allocation vs. Permitted Units	Very Low Income Level RHNA Allocation vs. Permitted Units
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Source: Association of Bay Area Governments, <http://housing.abag.ca.gov/>



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

<b>File #:</b>	19-1301	<b>Version:</b>	1	<b>Name:</b>	
<b>Type:</b>	Report	<b>Status:</b>		Informational	
<b>File created:</b>	11/4/2019	<b>In control:</b>		ABAG Housing Methodology Committee	
<b>On agenda:</b>	11/14/2019	<b>Final action:</b>			
<b>Title:</b>	Local Jurisdiction Survey				
	Discussion of a draft of the Local Jurisdiction Survey required to be conducted by ABAG per Housing Element Law.				
<b>Sponsors:</b>					
<b>Indexes:</b>					
<b>Code sections:</b>					
<b>Attachments:</b>	<a href="#">Item 07a0 Summary Sheet Local Jurisdiction Survey.pdf</a>				
	<a href="#">Item 07a1 Attachment A Memo Survey and AFFH Overview.pdf</a>				
	<a href="#">Item 07a2 Attachment B RHNA Statutory Factors.pdf</a>				
	<a href="#">Item 07a3 Attachment C DRAFT Local Jurisdiction Survey v3.pdf</a>				

Date	Ver.	Action By	Action	Result
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### Local Jurisdiction Survey

Discussion of a draft of the Local Jurisdiction Survey required to be conducted by ABAG per Housing Element Law.

Gillian Adams

Information



**Association of Bay Area Governments**

**Housing Methodology Committee**

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**November 14, 2019**

**Agenda Item 7.a.**

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**Local Jurisdiction Survey**

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**Subject:** Discussion of a draft of the Local Jurisdiction Survey required to be conducted by ABAG per Housing Element Law.

**Background:** The Regional Housing Need Allocation (RHNA) process requires surveying local jurisdictions to compile information related to the allocation methodology factors defined by statute. Changes to state law enacted in 2018 also require the survey to include questions related to affirmatively furthering fair housing (AFFH). These 2018 laws reflect a 2015 federal regulation issued by the Department of Housing and Urban Development (HUD).

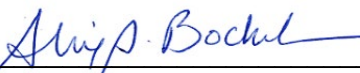
**Issues:** None

**Recommended Action:** Information

**Attachment:**

- A. Memo Survey and AFFH Overview
- B. RHNA Statutory Factors
- C. DRAFT Local Jurisdiction Survey

**Reviewed:**

  
\_\_\_\_\_  
Alix Bockelman

# REGIONAL HOUSING NEEDS ALLOCATION



TO: Housing Methodology Committee

DATE: November 7, 2019

FR: Deputy Executive Director, Policy

RE: Local Jurisdiction Survey and Fair Housing Overview

## What is the Local Jurisdiction Survey?

The State of California requires each Council of Governments (COG) to survey its member jurisdictions during the Regional Housing Need Allocation (RHNA) process.<sup>1</sup> The survey's purpose is to gather information on the factors that the Housing Methodology Committee (HMC) must consider when developing the allocation methodology (**Attachment B**). The law states that the local jurisdiction survey cannot be administered more than six months prior to developing the allocation methodology.<sup>2</sup> The Association of Bay Area Governments (ABAG), the COG for the Bay Area, currently plans to distribute the survey electronically to Bay Area jurisdictions in January 2020. ABAG staff is seeking feedback from the HMC on the draft survey before it is presented to the ABAG Regional Planning Committee for approval in December 2019.

ABAG staff considered the following priorities when developing the local jurisdiction survey:

- **Minimize response burden for local jurisdiction staff:** ABAG staff seek to create a survey that can compile a range of meaningful data while enabling a high rate of completion and thorough responses from local jurisdictions.
- **Avoid asking local jurisdictions for publicly accessible and readily available data:** ABAG is cognizant of local staff's time constraints and intends for the survey responses to generate new information that ABAG and the HMC do not already have access to.
- **Focus on housing factors mandated by statute and most directly impacted by RHNA:** A variety of factors impact affordable housing and displacement issues in the Bay Area. While RHNA influences some aspects of regional housing policy, such as where housing is built, it does not directly affect other factors, such as policies to address the housing needs of specific populations. ABAG staff sought to create a survey focused on gathering information that relates most directly to the RHNA process.
- **Support local jurisdictions in their understanding of new Housing Element requirements:** Recent state legislation created new requirements for Housing Elements, such as the need to conduct an assessment of fair housing (discussed in more detail below). Accordingly, ABAG intends for this survey to assist local jurisdictions with compiling information that can be useful for future updates to their Housing Elements.

## New Survey Requirements for the 6<sup>th</sup> RHNA Cycle

In past RHNA cycles, ABAG and other COGs were required to survey local jurisdictions for information related to the factors in Government Code Section 65584.04(e). The list of factors for the current RHNA cycle are in Attachment B.

<sup>1</sup> See State of California [Government Code Section 65584.04\(b\)\(1\)](#).

<sup>2</sup> See State of California [Government Code Section 65584.04\(b\)\(1\)](#).

In 2018, Assembly Bill (AB) 1771 added a new RHNA objective: affirmatively furthering fair housing. Government Code Section 65584(e) provides the following definition for “affirmatively furthering fair housing” (AFFH):

“...taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, affirmatively furthering fair housing means taking meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws.”

Similarly, the law requires the local jurisdiction survey to collect information on jurisdictions’ fair housing issues as well as their strategies and actions for achieving fair housing goals.<sup>3</sup> Accordingly, the local jurisdiction survey for the 6<sup>th</sup> RHNA cycle includes questions specifically focused on topics related to affirmatively furthering fair housing.

### **Overview of Fair Housing Law and Affirmatively Furthering Fair Housing**

The Fair Housing Act is a federal law passed in 1968 that protects individuals from experiencing housing discrimination based on the following characteristics<sup>4</sup>:

1. Race
2. Color
3. National Origin
4. Religion
5. Sex
6. Familial Status
7. Disability

California expands on the protected classes defined by federal law by also prohibiting housing discrimination based on the following characteristics<sup>5</sup>:

1. Sexual orientation
2. Gender identity and gender expression
3. Genetic information
4. Marital status
5. Source of income
6. Citizenship
7. Primary language
8. Immigration status

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<sup>3</sup> See State of California [Government Code Section 65584.04\(b\)\(2\)](#).

<sup>4</sup> See [https://www.hud.gov/program\\_offices/fair\\_housing\\_equal\\_opp/fair\\_housing\\_act\\_overview](https://www.hud.gov/program_offices/fair_housing_equal_opp/fair_housing_act_overview) for an overview on the Fair Housing Act from the Department of Housing and Urban Development.

<sup>5</sup> See <https://www.dfeh.ca.gov/housing/> for information from California’s Department of Fair Employment and Housing on state fair housing protections.

**State and Local Fair Housing Planning:** Federal fair housing laws obligate state and local jurisdictions receiving block grant funding from the Department of Housing and Urban Development (HUD) to reduce barriers to fair housing. Block grant recipients must submit a Consolidated Plan to HUD every five years, and this process requires conducting an Analysis of Impediments to Fair Housing Choice (AI).<sup>6</sup> Currently, the State of California and 39 Bay Area cities and counties participate in the Consolidated Plan process and have submitted AI reports to HUD.

**Federal Regulations Related to Affirmatively Furthering Fair Housing:** The Fair Housing Act not only prohibits housing discrimination, but also requires affirmatively furthering fair housing. In 2015, HUD released a final rule on AFFH to clarify grantees' obligations to promote fair housing and equal opportunity. The 2015 AFFH rule provided updated guidelines for assessing fair housing issues and created a new Assessment of Fair Housing (AFH) tool to replace the AI process. HUD intended the AFH to improve community planning around fair housing issues, as this new tool required public participation and increased data analysis related to local housing dynamics, patterns of segregation, and access to opportunity. The 2015 AFFH rule also mandated that jurisdictions set fair housing goals and incorporate the goals into their Consolidated Plans.<sup>7</sup>

In 2018, HUD issued a notice suspending the AFH tool. The withdrawal of this tool limits implementation of the 2015 AFFH rule. HUD grantees are no longer required to submit an AFH as part of the Consolidated Plan process, and the previous requirement to complete an AI report has been reinstated.<sup>8</sup> Prior to the 2018 decision, HUD received only one AFH from Bay Area jurisdictions, which was completed in 2017 as a collaborative effort by the Cities of Daly City, San Mateo, South San Francisco, and Redwood City along with the County of San Mateo.<sup>9</sup>

**State Regulations Related to Affirmatively Furthering Fair Housing:** Two bills passed by the state legislature in 2018 mirror the requirements set by HUD in its 2015 AFFH rule. AB 686 requires public agencies to administer housing and community development programs in a way that affirmatively furthers fair housing, and the law mandates that Housing Element revisions after January 1, 2021 include an assessment of fair housing. AB 686 also states that AFFH obligations must be interpreted in a manner consistent with HUD's 2015 AFFH rule regardless of subsequent amendments to or suspensions of the rule.<sup>10</sup> As noted previously, AB 1771 adds AFFH as a RHNA objective and requires COGs to survey local jurisdictions to compile information related to this objective.<sup>11</sup> Consequently, the 2015 AFFH regulations continue to impact California jurisdictions despite the 2018 changes to the rule, and the new requirements for the 6<sup>th</sup> RHNA cycle reflect these AFFH obligations.

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<sup>6</sup> See <https://www.hudexchange.info/programs/consolidated-plan/consolidated-plan-process-grant-programs-and-related-hud-programs/> for more information on the Consolidated Plan process.

<sup>7</sup> See <https://files.hudexchange.info/resources/documents/AFFH-Fact-Sheet.pdf> and <https://www.hudexchange.info/programs/affh/overview/> for more information on the 2015 AFFH rule and the AFH tool.

<sup>8</sup> See <https://files.hudexchange.info/resources/documents/FR-Notice-AFFH-AI-Notice.pdf> for a copy of the 2018 HUD notice.

<sup>9</sup> See [https://housing.smcgov.org/sites/housing.smcgov.org/files/\\_SMC%20Regional%20AFH%20Final%20Report%2020171002.pdf](https://housing.smcgov.org/sites/housing.smcgov.org/files/_SMC%20Regional%20AFH%20Final%20Report%2020171002.pdf) for a copy of the San Mateo County Regional AFH.

<sup>10</sup> See [https://leginfo.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180AB686](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=201720180AB686) for the text of AB 686.

<sup>11</sup> See [https://leginfo.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180AB1771](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=201720180AB1771) for the text of AB 1771.



# REGIONAL HOUSING NEEDS ALLOCATION



## Statutory Factors Required to be Considered in RHNA Methodology

The State of California requires each Council of Governments (COG) to survey its member jurisdictions during the Regional Housing Need Allocation (RHNA) process.<sup>1</sup> The survey's purpose is to gather information on the following list of factors that must be considered when developing the allocation methodology.<sup>2</sup>

Italicized and bolded text indicates factors that have been added or revised for this RHNA cycle (6<sup>th</sup> cycle).

### Summary of RHNA Factors – from Government Code §65584.04(e)

- (1) Existing and projected jobs and housing relationship, ***particularly low-wage jobs and affordable housing***
- (2) Lack of capacity for sewer or water service due to decisions outside the jurisdiction's control.
- (3) The availability of land suitable for urban development.
- (4) Lands protected from urban development under existing federal or state programs
- (5) County policies to preserve prime agricultural land.
- (6) The distribution of household growth assumed for regional transportation plans and opportunities to maximize use of public transportation and existing transportation infrastructure.
- (7) Agreements between a county and cities in a county to direct growth toward incorporated areas of the county
- (8) The loss of units in assisted housing developments as a result of expiring affordability contracts.
- (9) ***The percentage of existing households paying more than 30 percent and more than 50 percent of their income in rent.***
- (10) ***The rate of overcrowding.***
- (11) The housing needs of farmworkers.
- (12) The housing needs generated by the presence of a university within the jurisdiction.
- (13) ***The loss of units during a state of emergency that have yet to be rebuilt or replaced at the time of the analysis.***
- (14) ***The region's greenhouse gas emissions targets provided by the State Air Resources Board.***

<sup>1</sup> See State of California [Government Code Section 65584.04\(b\)\(1\)](#).

<sup>2</sup> See State of California [Government Code Section 65584.04\(e\)](#).

#### **RHNA Factors – Government Code §65584.04(e)**

To the extent that sufficient data is available from local governments pursuant to subdivision (b) or other sources, each council of governments, or delegate subregion as applicable, shall include the following factors to develop the methodology that allocates regional housing needs:

- (1) Each member jurisdiction's existing and projected jobs and housing relationship. ***This shall include an estimate based on readily available data on the number of low-wage jobs within the jurisdiction and how many housing units within the jurisdiction are affordable to low-wage workers as well as an estimate based on readily available data, of projected job growth and projected household growth by income level within each member jurisdiction during the planning period.***
- (2) The opportunities and constraints to development of additional housing in each member jurisdiction, including all of the following:
  - (A) Lack of capacity for sewer or water service due to federal or state laws, regulations or regulatory actions, or supply and distribution decisions made by a sewer or water service provider other than the local jurisdiction that preclude the jurisdiction from providing necessary infrastructure for additional development during the planning period.
  - (B) The availability of land suitable for urban development or for conversion to residential use, the availability of underutilized land, and opportunities for infill development and increased residential densities. The council of governments may not limit its consideration of suitable housing sites or land suitable for urban development to existing zoning ordinances and land use restrictions of a locality, but shall consider the potential for increased residential development under alternative zoning ordinances and land use restrictions. The determination of available land suitable for urban development may exclude lands where the Federal Emergency Management Agency (FEMA) or the Department of Water Resources has determined that the flood management infrastructure designed to protect that land is not adequate to avoid the risk of flooding.
  - (C) Lands preserved or protected from urban development under existing federal or state programs, or both, designed to protect open space, farmland, environmental habitats, and natural resources on a long-term basis, ***including land zoned or designated for agricultural protection or preservation that is subject to a local ballot measure that was approved by the voters of that jurisdiction that prohibits or restricts conversion to non-agricultural uses.***
  - (D) County policies to preserve prime agricultural land, as defined pursuant to Section 56064, within an unincorporated area, ***and land within an unincorporated area zoned or designated for agricultural protection or preservation that is subject to a local ballot measure that was approved by the voters of that jurisdiction that prohibits or restricts its conversion to non-agricultural uses.***

- (3) The distribution of household growth assumed for purposes of a comparable period of regional transportation plans and opportunities to maximize the use of public transportation and existing transportation infrastructure.
- (4) Agreements between a county and cities in a county to direct growth toward incorporated areas of the county and land within an unincorporated area zoned or designated for agricultural protection or preservation that is subject to a local ballot measure that was approved by the voters of the jurisdiction that prohibits or restricts conversion to non-agricultural uses.
- (5) The loss of units contained in assisted housing developments, as defined in paragraph (9) of subdivision (a) of Section 65583, that changed to non-low-income use through mortgage prepayment, subsidy contract expirations, or termination of use restrictions.
- (6) ***The percentage of existing households at each of the income levels listed in subdivision (e) of Section 65584 that are paying more than 30 percent and more than 50 percent of their income in rent.***
- (7) ***The rate of overcrowding.***
- (8) The housing needs of farmworkers.
- (9) The housing needs generated by the presence of a private university or a campus of the California State University or the University of California within any member jurisdiction.
- (10) ***The loss of units during a state of emergency that was declared by the Governor pursuant to the California Emergency Services Act (Chapter 7 (commencing with Section 8550) of Division 1 of Title 2), during the planning period immediately preceding the relevant revision pursuant to Section 65588 that have yet to be rebuilt or replaced at the time of the analysis.***
- (11) ***The region's greenhouse gas emissions targets provided by the State Air Resources Board pursuant to Section 65080.***
- (12) Any other factors adopted by the council of governments, ***that further the objectives listed in subdivision (d) of Section 65584, provided that the council of governments specifies which of the objectives each additional factor is necessary to further. The council of governments may include additional factors unrelated to furthering the objectives listed in subdivision (d) of Section 65584 so long as the additional factors do not undermine the objectives listed in subdivision (d) of Section 65584 and are applied equally across all household income levels as described in subdivision (f) of Section 65584 and the council of governments makes a finding that the factor is necessary to address significant health and safety conditions.***

# REGIONAL HOUSING NEEDS ALLOCATION



Association of Bay Area Governments

## DRAFT

### Local Jurisdiction Survey on Housing Factors and Fair Housing

For RHNA Cycle 6, 2022-2030

Jurisdiction: \_\_\_\_\_

Name(s) of Person(s) Filling Out Survey: \_\_\_\_\_

Title(s): \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

As part of the Regional Housing Need Allocation (RHNA) process, ABAG is required to survey local governments for information on specific factors to be considered in developing the allocation methodology. Recent legislation has updated some of the factors listed and added new factors. For the full list of factors currently required by statute, please refer to [Government Code Section 65584.04\(e\)](#).

Please review each question below and provide any information that may be relevant to the RHNA methodology.

Per Government Code Section 65584.04(g), there are several criteria that **cannot** be used to determine or reduce a jurisdiction's RHNA allocation:

1. Any ordinance, policy, voter-approved measure, or standard of a city or county that directly or indirectly limits the number of residential building permits issued by the jurisdiction
2. Prior underproduction of housing units as measured by the last RHNA cycle allocation
3. Stable population numbers in a jurisdiction during the previous RHNA cycle

Learn more about the overall RHNA process, and ABAG's role, at <https://abag.ca.gov/our-work/housing/rhna-regional-housing-needs-allocation>.

Thank you for your time! Please direct any questions or concerns to [RHNA@bayareametro.gov](mailto:RHNA@bayareametro.gov).



## SECTION 1: QUESTIONS ABOUT HOUSING AND LAND USE

### RELATIONSHIP BETWEEN JOBS AND HOUSING

1. Please see [resource] for the jobs-housing fit<sup>1</sup> ratio for your jurisdiction. Based on your knowledge of your jurisdiction, do you have reason to believe the federal data sources may not accurately account for the number of low-wage jobs and/or housing units affordable to low-income households in your community? If so, please report your own data below:

2. What impacts does the balance or imbalance of low-wage workers to affordable homes have on your jurisdiction?

3. Do you expect your jurisdiction's balance of low-wage workers to affordable homes to change by 2030? If so, why?

### HOUSING OPPORTUNITIES AND CONSTRAINTS

4. Which of the following apply to your city or county as either an opportunity or a constraint for development of additional housing by 2030? Check all that apply.

	Opportunity	Constraint	Explanation
Sewer capacity	<input type="checkbox"/>	<input type="checkbox"/>	
Water capacity	<input type="checkbox"/>	<input type="checkbox"/>	
Land suitability	<input type="checkbox"/>	<input type="checkbox"/>	
Lands protected by federal or state programs	<input type="checkbox"/>	<input type="checkbox"/>	
County policies to preserve agricultural land	<input type="checkbox"/>	<input type="checkbox"/>	
Schools	<input type="checkbox"/>	<input type="checkbox"/>	
Parks	<input type="checkbox"/>	<input type="checkbox"/>	
Public services	<input type="checkbox"/>	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	

<sup>1</sup> Jobs-Housing Fit looks beyond the traditional jobs-housing balance metric to measure the balance between a jurisdiction's total number of low-wage workers and the number of homes affordable to them.

5. What obstacles does your jurisdiction face in encouraging growth that maximizes the use of public transportation and existing transportation infrastructure?

6. What agreements, if any, are in place between your county and the cities in your county that direct growth toward either the incorporated or unincorporated areas of the county?

#### HOUSING AFFORDABILITY AND OVERCROWDING

7. Please see [resource] for the percentage of households in your jurisdiction currently paying more than 30% and more than 50% of their income in rent, according to the 2018 American Community Survey. What impacts do high housing costs and the proportion of rent-burdened households have in your jurisdiction?

8. Please see [resource] for the rate of overcrowding in your jurisdiction. What impacts does overcrowding have in your jurisdiction? Do you expect this to change by 2030?

#### HOUSING DEMAND

9. What is the total need for farmworker housing in your jurisdiction?

10. Are you currently meeting that demand? If not, what is the total of unmet need?

11. Do you expect to be meeting the demand in 2030?

☐ Yes   ☐ No   ☐ N/A

Comments:

12. What are the total housing needs generated by a private university or a campus of the California State University or the University of California in your jurisdiction?

13. Are you currently meeting that demand? If not, what is the total of unmet need?

14. Do you expect to be meeting the demand in 2030?

☐ Yes ☐ No ☐ N/A

Comments:

15. Has your jurisdiction experienced a loss of units in [assisted housing developments](#) in the past 10 years?

☐ Yes ☐ No

16. If yes, how many units? Please explain:

17. Has your jurisdiction lost housing units due to an emergency (fire, natural disasters, etc.) that have yet to be rebuilt or replaced as of today?

☐ Yes ☐ No

18. If yes, how many units? Please explain:

## SECTION 2: QUESTIONS ABOUT FAIR HOUSING ISSUES, GOALS, AND ACTIONS

As required by law, ABAG is collecting information on local jurisdictions' fair housing issues as well as strategies and actions for achieving fair housing goals. Government Code Section 65584(d) mandates that the RHNA methodology affirmatively furthers fair housing<sup>2</sup>, and your participation in this survey is crucial for developing a methodology that can help achieve this objective. Using your jurisdiction's Housing Element, Analysis of Impediments to Fair Housing Choice, Assessment of Fair Housing, and/or other data sources, please answer the questions below.

### FAIR HOUSING PLANNING AND DATA SOURCES

19. Has your jurisdiction completed an Analysis of Impediments to Fair Housing Choice or Assessment of Fair Housing for the U.S. Department of Housing and Urban Development (HUD)?

- ☐ Analysis of Impediments  
☐ Assessment of Fair Housing  
☐ None

If yes, when was this report last submitted? \_\_\_\_\_

Please upload or provide a link to the document: \_\_\_\_\_

20. What data sources does your jurisdiction maintain or use to assess fair housing issues in the community?

21. Which of the following outreach activities has your jurisdiction used to encourage community participation in planning processes related to fair housing? Check all that apply.

- ☐ Resident survey  
☐ Resident focus groups  
☐ Open house community meetings  
☐ Public hearing  
☐ Town hall  
☐ Stakeholder consultation

Groups consulted:

- ☐ Other (please describe)

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<sup>2</sup> Per Government Code 65584(e), affirmatively furthering fair housing is defined as “taking meaningful actions, in addition to combating discrimination, that overcome patterns of segregation and foster inclusive communities free from barriers that restrict access to opportunity based on protected characteristics. Specifically, affirmatively furthering fair housing means taking meaningful actions that, taken together, address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws.”



22. How successful were your efforts to elicit community participation for fair housing planning?  
☐ N/A   ☐ Unsuccessful   ☐ Somewhat Unsuccessful   ☐ Somewhat Successful   ☐ Successful

23. Describe reasons for the success or lack of success of these community engagement efforts:

## DIVERSITY AND SEGREGATION

24. Which of the following factors contribute to segregated housing patterns or racially/ethnically concentrated areas of poverty in your jurisdiction? Or if your jurisdiction lacks racial/ethnic and/or economic diversity, which of the following factors prevent access to housing in your jurisdiction?

Check all that apply:	Describe how this factor contributes to fair housing issues in your jurisdiction:
<input type="checkbox"/> Patterns of community opposition	
<input type="checkbox"/> Displacement of residents due to economic pressures, such as increased rents	
<input type="checkbox"/> Land use and zoning laws, such as minimum lot sizes, limits on multi-unit properties, height limits, or minimum parking requirements	
<input type="checkbox"/> Occupancy standards that limit the number of people in a unit	
<input type="checkbox"/> Location and type of affordable housing	
<input type="checkbox"/> Foreclosure patterns	
<input type="checkbox"/> Deteriorated or abandoned properties	
<input type="checkbox"/> Lack of community revitalization strategies	
<input type="checkbox"/> Lack of private investments in specific neighborhoods	
<input type="checkbox"/> Lack of public investments in specific neighborhoods, including services or amenities	
<input type="checkbox"/> Lack of regional cooperation	
<input type="checkbox"/> Residential real estate "steering" where prospective renters/buyers are guided to certain locations based on race or other characteristic protected by fair housing law	
<input type="checkbox"/> Lending discrimination	
<input type="checkbox"/> Private discrimination	
<input type="checkbox"/> Other (please describe)	

25. Which factors are highest priority for your jurisdiction and why?

## ACCESS TO OPPORTUNITY

26. Which of the following factors contribute to disparities in access to proficient schools, employment opportunities, and/or healthy neighborhoods for groups protected by California housing laws<sup>3</sup> in your jurisdiction?

Check all that apply:	Describe how this factor contributes to fair housing issues in your jurisdiction:
<input type="checkbox"/> Land use and zoning laws, such as minimum lot sizes, limits on multi-unit properties, height limits, or minimum parking requirements	
<input type="checkbox"/> Occupancy standards that limit the number of people in a unit	
<input type="checkbox"/> Location and type of affordable housing	
<input type="checkbox"/> Access to financial services	
<input type="checkbox"/> The availability, type, frequency, and reliability of public transportation	
<input type="checkbox"/> Lack of private investments in specific neighborhoods	
<input type="checkbox"/> Lack of public investments in specific neighborhoods, including services or amenities	
<input type="checkbox"/> Lack of regional cooperation	
<input type="checkbox"/> Lending discrimination	
<input type="checkbox"/> Location of employers	
<input type="checkbox"/> Location of environmental health hazards	
<input type="checkbox"/> Location of proficient schools and school assignment policies	
<input type="checkbox"/> Private discrimination	
<input type="checkbox"/> Other (please describe)	

27. Which factors are the highest priority for your jurisdiction and why?

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<sup>3</sup> [California law](#) protects individuals from discrimination in housing based on the following: race/color, ancestry/national origin, religion, disability (mental or physical), sex, gender, sexual orientation, gender identity/gender expression, genetic information, marital status, familial status, source of income, citizenship, primary language, and immigration status.

## DISPROPORTIONATE HOUSING NEEDS

28. Which of the following factors contribute to higher rates of housing cost burden, overcrowding, or substandard housing for groups protected by California housing laws compared to other groups in your jurisdiction?

Check all that apply:	Describe how this factor contributes to fair housing issues in your jurisdiction:
<input type="checkbox"/> Land use and zoning laws, such as minimum lot sizes, limits on multi-unit properties, height limits, or minimum parking requirements	
<input type="checkbox"/> The availability of affordable units in a range of sizes	
<input type="checkbox"/> Displacement of residents due to economic pressures	
<input type="checkbox"/> Lack of private investments in specific neighborhoods	
<input type="checkbox"/> Lack of public investments in specific neighborhoods, including services or amenities	
<input type="checkbox"/> Lending discrimination	
<input type="checkbox"/> Other (please describe)	

29. Which factors are the highest priority for your jurisdiction and why?

## FAIR HOUSING GOALS AND ACTIONS

30. What actions has your jurisdiction taken to overcome historical patterns of segregation or remove barriers to equal housing opportunity?

31. How successful have these efforts been?

☐ N/A   ☐ Unsuccessful   ☐ Somewhat Unsuccessful   ☐ Somewhat Successful   ☐ Successful

Describe reasons for success or lack thereof:

32. Which of the following policies, programs, or actions does your jurisdiction use to prevent or mitigate the displacement of low-income households? Check all that apply.

	In Use	Intend to Adopt
Just cause eviction ordinance	<input type="checkbox"/>	<input type="checkbox"/>
Rent stabilization/rent control	<input type="checkbox"/>	<input type="checkbox"/>
Rent review board and/or mediation	<input type="checkbox"/>	<input type="checkbox"/>
Mobile home rent control	<input type="checkbox"/>	<input type="checkbox"/>
Single-room occupancy (SRO) preservation	<input type="checkbox"/>	<input type="checkbox"/>
Condominium conversion regulations	<input type="checkbox"/>	<input type="checkbox"/>
Foreclosure assistance	<input type="checkbox"/>	<input type="checkbox"/>
Affordable housing impact/linkage fee on new residential development	<input type="checkbox"/>	<input type="checkbox"/>
Affordable housing impact/linkage fee on new commercial development	<input type="checkbox"/>	<input type="checkbox"/>
Inclusionary zoning	<input type="checkbox"/>	<input type="checkbox"/>
Community land trusts	<input type="checkbox"/>	<input type="checkbox"/>
First source hiring ordinances	<input type="checkbox"/>	<input type="checkbox"/>
Other (please describe)	<input type="checkbox"/>	<input type="checkbox"/>
<div></div>		

**THANK YOU! ANY ADDITIONAL FACTORS/COMMENTS**

Thank you for your time!

33. Are there any other factors that you think ABAG should consider throughout the RHNA process?

34. Any further comments about anything in this survey?



# Metropolitan Transportation Commission

375 Beale Street, Suite 800  
San Francisco, CA 94105

## Legislation Details (With Text)

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<b>File #:</b>	19-1302	<b>Version:</b>	1	<b>Name:</b>	
<b>Type:</b>	Report	<b>Status:</b>		Informational	
<b>File created:</b>	11/4/2019	<b>In control:</b>		ABAG Housing Methodology Committee	
<b>On agenda:</b>	11/14/2019	<b>Final action:</b>			
<b>Title:</b>	Introduction to Factors Via HMC's Housing Goals				

Staff will report on the key themes envisioned by the HMC in its discussion of desired goals and outcomes for the RHNA process and continue the conversation about relating these goals to methodology factors.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** [Item 08a0 Summary Sheet Report on Visioning v2.pdf](#)  
[Item 08a1 Attachment A Memo Intro to Factors via HMC Housing Goals.pdf](#)  
[Item 08a2 Attachment B Visioning Housing Goals Summary.pdf](#)  
[Item 08a3 Attachment C RHNA Statutory Objectives and Factors.pdf](#)

Date	Ver.	Action By	Action	Result
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### Introduction to Factors Via HMC's Housing Goals

Staff will report on the key themes envisioned by the HMC in its discussion of desired goals and outcomes for the RHNA process and continue the conversation about relating these goals to methodology factors.

Gillian Adams

Information



**Association of Bay Area Governments**

**Housing Methodology Committee**

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**November 14, 2019**

**Agenda Item 8.a.**

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**Introduction to Factors Via HMC's Housing Goals**

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**Subject:** Staff will report on the key themes envisioned by the HMC in its discussion of desired goals and outcomes for the RHNA process and continue the conversation about relating these goals to methodology factors.

**Background:** Staff will summarize the results of the HMC's discussion at the October 18<sup>th</sup> meeting about envisioning desired outcomes and goals for the RHNA process and continue the conversation about relating these goals to methodology factors.


**Issues:** None

**Recommended Action:** Information

**Attachment:**

- A. Memo Intro to Factors via HMC Housing Goals
- B. Visioning Housing Goals Summary
- C. RHNA Statutory Objectives and Factors

**Reviewed:**

  
Alix Bockelman

# REGIONAL HOUSING NEEDS ALLOCATION



Association of Bay Area Governments

TO: Housing Methodology Committee

DATE: November 7, 2019

FR: Deputy Executive Director, Policy

RE: Introduction to Factors via HMC's Housing Goals

## Overview

The role of the Association of Bay Area Governments (ABAG) in the Regional Housing Needs Allocation (RHNA) process is to develop the methodology for allocating a share of the region's total housing need to each city, town, and county in the Bay Area. The Housing Methodology Committee (HMC) has been convened to advise ABAG staff on the methodology for the 6<sup>th</sup> RHNA cycle (2022-2030), and to ensure the methodology considers the factors and meets the objectives outlined in Housing Element Law.

The allocation methodology is a mathematical formula that divvies up the Bay Area's total housing need by quantifying the number of housing units, separated into four income categories, that will be assigned to each city, town, and county to incorporate into its Housing Element. Members of the HMC will work collaboratively to select factors to combine into an allocation methodology. A factor is a way to translate a planning principle or attribute into numbers. Factors use data for each jurisdiction in the region about the selected principle or attribute to determine each jurisdiction's share of the total housing need.

## Visioning Housing Goals

At the initial meeting of the HMC, members worked in small groups to identify the housing goals and outcomes they would like to see for the Bay Area as a result of the RHNA process.

**Attachment B** shows committee members' comments organized by theme. The major themes can be summarized as:

1. Emphasize benefits to the region as a whole
2. Ensure transparency and ease of understanding, make sure people feel heard
3. Get more units built: make sure everyone has a place to live
4. Further social and racial equity
5. Create choices for all, so all communities have access to opportunities
6. Further the jobs-housing fit
7. Use this process as an opportunity to communicate the magnitude of the need for housing

Some of these key themes focus on desired characteristics for the RHNA process and methodology (e.g., transparent, easy to understand), while others identify some of the preferred outcomes for the region that would result from implementation of the RHNA methodology (e.g., further social and racial equity, create choices for all).

## **Translating Themes into Factors**

Now that the HMC has envisioned desired outcomes for the RHNA process, the next step in developing the allocation methodology will be to translate these themes into factors that would advance the desired outcomes. In developing the allocation methodology, members of the HMC are tasked with working collaboratively to select the best mix of factors that would result in an equitable distribution of housing need throughout the region. The paradigm and requirements for RHNA are outlined in Housing Element Law, but development of the methodology offers an opportunity to tailor those requirements to our regional context. Committee members will have to grapple with determining what is “equitable” and finding the right balance in achieving each of the RHNA objectives, which can sometimes appear to be at odds with one another. For reference, **Attachment C** shows the 6<sup>th</sup> Cycle objectives and factors. Highlighted text in that attachment identifies places where the requirements were modified.

## ***The Narrow Scope of RHNA***

One of the challenges for HMC members will be to keep in mind the desired outcomes for the Bay Area identified in the visioning while working within the limited scope of the RHNA process. The primary role of the RHNA methodology is to encourage a pattern of housing growth for the Bay Area. The allocation formula assigns units based on relative relationships between jurisdictions within the region. For example, if there is a factor to allocate units based on access to jobs, then a jurisdiction with many jobs will be allocated more units and a jurisdiction with fewer jobs will be allocated fewer units. Given the need to allocate units among the region’s 109 jurisdictions, it can be difficult to address the specific nuances of each community’s local context in the methodology.

Similarly, RHNA does not play a role in identifying specific locations within a jurisdiction that will be zoned for housing nor in selecting or implementing the policies a local government will use to meet the housing needs of its residents or specific population groups. Although the HMC may select factors that conceptually assign housing to a particular geography, such as near a transit stop or in proximity to jobs, the resulting allocation from ABAG goes to the jurisdiction as a whole. It is up to the local government to select the specific sites within its community that will be zoned for housing in its Housing Element.

Local governments are also responsible for choosing the strategies and policies that are best suited to meeting their community’s housing needs as long as they are consistent with Housing Element Law. For example, while the RHNA methodology must seek to affirmatively further fair housing, identifying policies to address the housing needs of a particular group is beyond the scope of RHNA.

## **Next Steps**

Over the next several months, ABAG staff will work with the HMC to prioritize the key factors to include in the methodology and to develop options for the best way to implement these factors. As a starting place, staff will engage HMC members in a discussion of potential factors that embody the desired outcomes summarized above. The panel discussion earlier today provided ideas and perspectives on potential options for addressing social equity in the RHNA

methodology – particularly related to affirmatively furthering fair housing and jobs-housing fit. Some sample factors include:

- Proximity to transit
- Proximity to jobs
- Access to high resource neighborhoods
- Jobs-housing balance
- Jobs-housing fit

The factors will continue to be refined based on considerations of available data sources and decisions about what aspects of a particular factor to emphasize. In December, staff will present an overview of Plan Bay Area 2050 and go into more detail about sample methodologies from other COGs and previous RHNA cycles, as a way to continue refining the factors.

# REGIONAL HOUSING NEEDS ALLOCATION



## Summary by Theme of HMC Comments on Visioning Housing Goals from October 18 Meeting

### 1. Emphasize benefits to the region as a whole

- More regional thinking.
- Come up with a RHNA methodology that has universal support that makes sense and is fair and equitable.
- Think holistically: about sustainability, health, equity, and greenhouse gas reductions.
- Create housing stability for all income levels that benefits the region as a whole.
- Do all cities have space to accept more housing? Or is the region reaching capacity?

### 2. Ensure transparency and ease of understanding, make sure people feel heard

- Transparency and ease of understanding for the ultimate methodology. Make sure we help communicate it to people affected.
- Have people and communities satisfied with the final conclusion, and feel that people are heard. This includes people in this group, and those who are not.

### 3. Get more units built: make sure everyone has a place to live

- Make sure everyone has a place to live. Address homelessness and fixed incomes.
- Make sure RHNA is a useful tool.
- Numbers should result in units being built by maximizing housing laws.
- Ensure outcomes are realistic and consider what is feasible to build given construction costs.
- Make sure we are realistic, but also challenge our notions of what is realistic.

### 4. Further social and racial equity

- Outcomes will reflect the diversity in the region and take into consideration job deserts and unaffordable areas.
- Outcomes will be equitable and sustainable (greenhouse gas reductions).
- Social Equity.
- Equitable distribution of housing in the region.
- Better racial and economic equity.
- Reduce inequalities in government funding and climate impacts.
- Be able to see what the factors do for racial/social equity. Perhaps this may mean testing outcomes.



## **5. Create choices for all, so all communities have access to opportunities**

- People should be able to live where and how they want – all types of housing, families etc.
- Choices for all so all communities have opportunities for access to transit, jobs, and a livable wage.
- Place housing in the right locations – proximity to jobs and transit.
- Open opportunities to live in high-resource areas.
- Create housing stability for all income levels that benefits the region as a whole.
- Explore other ways to meet affordability other than density. Think about density that doesn't lead to sprawl.

## **6. Further the jobs-housing fit**

- Job to Housing Balance – between wages and housing affordability. Try to prioritize this relationship – is this done city by city, or by radius of where these jobs are created?
- Should there be average commute goals to achieve allocations (distance or time)?
- Should proximity to jobs be a higher priority than PDAs? Don't abandon but modify PDA.
- Get higher paying jobs into expensive suburbs or development opportunities.
- Address jobs and housing balance.
- Place housing in the right locations – proximity to jobs and transit.
- Support transit corridors.
- Responsibility for housing may be at the city-level because that is where approvals for commercial spaces and housing happen. Are there mechanisms to expand commercial space with housing?

## **7. Use this process as an opportunity to communicate the magnitude of the need for housing**

- Stay informed by implementation.
- Use this process as an opportunity to communicate and educate the magnitude of the need for housing.
- Connecting to the people that are impacted.

## REGIONAL HOUSING NEEDS ALLOCATION



### Summary of Statutory Objectives and Factors for RHNA

This is a summary of the statutory objectives the RHNA allocation is required to meet and the factors that are required to be considered in the allocation methodology. Italicized and bolded text indicates factors that have been added or revised for this RHNA cycle (6<sup>th</sup> cycle).

#### Summary of RHNA Objectives – from Government Code §65584(d) and (e)

The regional housing needs allocation plan shall further all of the following objectives:

- (1) Increase housing supply and mix of housing types, tenure, and affordability all cities and counties within the region in an equitable manner
- (2) Promote infill development and socioeconomic equity, protect environmental and agricultural resources, encourage efficient development patterns, **and achieve GHG reduction targets**
- (3) Promote improved intraregional jobs-housing relationship, **including balance between low-wage jobs and housing units affordable to low-wage workers in each jurisdiction**
- (4) Balance disproportionate household income distributions (more high-income RHNA to lower-income areas and vice-versa)
- (5) **Affirmatively further fair housing**

#### Summary of RHNA Factors – from Government Code §65584.04(e)

- (1) Existing and projected jobs and housing relationship, **particularly low-wage jobs and affordable housing**
- (2) Lack of capacity for sewer or water service due to decisions outside the jurisdiction's control.
- (3) The availability of land suitable for urban development.
- (4) Lands protected from urban development under existing federal or state programs
- (5) County policies to preserve prime agricultural land.
- (6) The distribution of household growth assumed for regional transportation plans and opportunities to maximize use of public transportation and existing transportation infrastructure.
- (7) Agreements between a county and cities in a county to direct growth toward incorporated areas of the county
- (8) The loss of units in assisted housing developments as a result of expiring affordability contracts.

- (9) ***The percentage of existing households paying more than 30 percent and more than 50 percent of their income in rent.***
- (10) ***The rate of overcrowding.***
- (11) The housing needs of farmworkers.
- (12) The housing needs generated by the presence of a university within the jurisdiction.
- (13) ***The loss of units during a state of emergency that have yet to be rebuilt or replaced at the time of the analysis.***
- (14) ***The region's greenhouse gas emissions targets provided by the State Air Resources Board.***



# Metropolitan Transportation Commission

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## Legislation Details (With Text)

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Feedback on Today's Meeting and What to Expect at the Next Meeting

Gillian Adams

Information