



## Regional Housing Technical Assistance Year One Highlights

Building on the foundation laid last year to launch ABAG's Regional Housing Technical Assistance (RHTA) Program, this year was spent developing the staffing and program infrastructure and creating the technical assistance to help Bay Area jurisdictions implement the sixth cycle of the Regional Housing Needs Allocation.

Since the project launched, the RHTA team has run 19 live, interactive webinars for about 2,000 attendees from Bay Area jurisdictions. The team has also launched seven county-based planning collaboratives to provide staff with resources and forums for discussion and provided services as varied as housing simulation tools, communications resources and numerous technical assistance products. Highlights include:

- Launched the new Housing TA Portal, providing a one-stop-shop for access to technical assistance case studies, data sets, interactive tools, model ordinances, reports, toolkits, trainings and much more.
- Refined existing technical assistance products and data tools, including developing "2.0" modules for the HESS tool and new "affirmatively furthering fair housing" and SB 9 material.
- Launched Work Groups focusing on Missing Middle Housing and Wildfire Resilience. The groups produced a series of products available to jurisdiction staff across the region, including an interactive tool that highlights the middle housing development potential throughout the San Francisco Bay Area.
- Partnered with Balancing Act to develop an online public engagement housing simulation tool that helps residents visualize sites for housing development in their communities. Through this partnership, ABAG has been able to provide free access to 25 jurisdictions and negotiate reduced-cost subscriptions for other Bay Area jurisdictions.
- Established a Regional Planning Bench and an online tool for procurement through City Innovate. The Bench and tool work together to streamline the contracting process for jurisdictions seeking to hire consultants for various parts of their Housing Element process.
- Procured 10 free licenses for Bay Area communities to pilot an innovative online tool that streamlines residential site plan review for applicants and planners. Licenses to the Plancheck Program software were provided in partnership with Symbium.
- Created a communications tool kit, including content and images for a social media campaign, a survey for jurisdictions to assess resident sentiment around housing, and information for elected officials to use in discussing housing with community members.
- Developed best practices for engagement with multilingual audiences, launched a process for helping jurisdictions access translation and interpretation services, and provided jurisdictions with remote meeting tools.

# Index of Regional Housing Technical Assistance Products

## Webinars

All materials are available on this webpage: <https://abag.ca.gov/our-work/housing/regional-housing-technical-assistance/training>

- Housing Planning: For the Future
- Planning Innovations Webinar: Regional Data Tools for the Housing Element
- Housing Element 101 - Overview and New Laws + Tips
- Creating Capacity: An Overview of the Sites Inventory
- Using Data Effectively in Housing Element Updates – ABAG’s Housing Needs Data Packets and Accessing the US Census
- How to Talk About Housing – Data-Driven Lessons on Housing Communications that Work and Those that Backfire
- Incorporating Environmental Justice and Safety into your Housing Element
- Housing Sites Inventory - Deep Dive
- Engage How To! Introduction to Remote Meeting Tools
- Affirmatively Furthering Fair Housing: The Nuts and Bolts with HCD
- Affirmatively Furthering Fair Housing: Data Deep Dive
- Integrating Climate Adaptation/Resilience into Your Housing Element
- Context of SB 9 and Potential Impacts
- HESS Tool 1.0 Tutorial Webinar
- Surplus Public Land: webinar and presentation
- New Housing Law: webinar and presentation
- Keep Calm and Certify On: Tips from Early Adopters
- New Annual Progress Report Requirements with HCD
- Webinar for Elected Officials: Learn About Available Assistance for Housing Element Updates

## Housing Data Tools

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

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

## Upcoming

ABAG has begun the development of two new **HESS Tool 2.0 Modules**, slated for release in 2022. The first module is an **AFFH Map** and is currently available; it allows local planners to visualize the distribution of their site inventories alongside key AFFH data layers. The second module will support jurisdictions with the **Realistic**

**Capacity Calculations** for sites included in their inventories and will be available in early 2022. ABAG has collected and analyzed data from local jurisdictions' Annual Progress Reports, Zoning Ordinances, and General Plans to adjust the theoretical maximum capacity of sites to reflect historical building trends more accurately. Users will be able to generate realistic capacity reports prepopulated with this data, which can be submitted to HCD as supportive documentation.

### Webinar Recordings

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

### Affirmatively Furthering Fair Housing

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

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

Additional AFFH TA includes:

- Affirmatively Furthering Fair Housing Policy Resources - [Annotated Bibliography](#)
- AFFH layer added to HESS tool
- [Segregation and Land Use Reports](#)
- [AFFH Tips Memo](#)
- Leading with Equity Working Group in progress

### Upcoming

- More Policies and Programs Guidance
- AFFH messaging guide

### Communications, Messaging & Community Engagement

- Housing Element Webinar: [How to Talk About Housing](#) – Data-Driven Lessons on Housing Communications that Work and Those that Backfire (4/27/2021)
- Housing Element Webinar: [Engage How To! Introduction to Remote Meeting Tools](#) (5/25/2021)

- Balancing Act online public engagement housing simulation tool available for 25 jurisdictions and reduced rate negotiated for additional jurisdictions
- [Access to template survey](#) for jurisdictions to send to community members to gather information about housing issues and concerns
- Access to tool kit, including messaging guide to provide assistance in discussing housing and AFFH with community members. Several items of the tool kit have already been produced and are available on the website.
- [New Housing TA portal](#), allowing ease of access to range of relevant materials
- [Guide to Housing Element + AFFH Public Participation](#)
- Assistance with translation and interpretation ([link](#)).

### Upcoming

- AFFH communications and Housing Messaging Guide
- Executive Summary and Guide for Outreach to Equity Priority Communities
- Additional outreach support available for jurisdictions
- AFFH outreach after comment letters

### Peer Cohorts and Work Groups

- Missing Middle Workgroup
  - a. Products
    1. Slide templates and talking points for use by staff
    2. Market report and interactive feasibility analysis tool
    3. Zoning guidebook
    4. Affordability strategies guidebook
    5. RHNA guidance memo
    6. [Middle Market Housing Development Tool](#)
  - b. Links
    - [Session 1: What is the Missing Middle?](#)
    - [Session 2: The Middle Housing Market](#)
    - [Session 3: Making Middle Housing Happen](#)
    - [Session 4: Making Middle Housing Affordable](#)
    - [Session 5: Projecting Middle Housing Production](#)
- Wildfire: all four sessions including webinar recordings, presentations, and resource guides are on [this website](#).
- “Big 3” Cohort (Oakland, San Francisco and San Jose)
- Leading with Equity Work Group

### Upcoming

- Malls & Office Parks
- Agricultural Communities Cohort

## Other Regional Products

- SB 9 materials from November webinars, FAQ, staff report and presentation template, summary <https://abag.ca.gov/our-work/housing/regional-housing-technical-assistance/sb-9-resources>
- Upcoming SB 9 TA
  - Model Ordinance
  - SB 9 Application Checklist
  - Affidavit regarding owner-occupancy
  - Optional affidavit regarding tenant occupancy
  - Sample deed restriction for two-unit developments
  - Same deed restriction for urban lot splits
- ADU Affordability Safe Harbor – counting towards RHNA
- [Consequences of Non-Compliance with Housing Element Update](#)
- Pilot of Symbium Plancheck software to streamline permitting ([see announcement](#))
- Parking TA:
  - [Parking toolbox and handbook](#)
  - [Parking presentation and webinars](#)
  - Future parking assistance [sign up form](#)

## Upcoming

- Farm Labor Housing Guidebook

## Templates

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

## Upcoming

- Final AFFH Data Guidance Checklist
- Template Segregation and Land Use Reports

## Resilience TA

- [Briefer on Integrated Planning - EJ and Safety Element Updates](#)
- [Sample Agenda for Integrating Planning](#)
- [Safety Element New Requirements](#)
- [Status of Resilience and EJ Planning in the Bay Area](#)

- ABAG webinar co-hosted by California Office of Planning & Research: [Incorporating Environmental Justice and Safety into your Housing Element: Webinar video recording](#) and [Webinar presentation](#)

## Regional Planning Consulting Bench

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

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

### Related Links

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

## Local Grants

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

## County Planning Collaboratives

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

### Collaborative Contacts:

1. Alameda: Meredith Rupp, UPP, [MRupp@up-partners.com](mailto:MRupp@up-partners.com)
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Recording of Planning Collaboratives Kick-Off April 13, 2021. This webinar introduces the County Planning Collaboratives.

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

## HCD TA

- [Housing Planning Hub Site](#) is a repository of statewide and regional toolkits, factsheets, and guidance on a variety of housing policy areas with a specific focus on [priority policy areas](#). HCD will continually update the resource center as new tools become available.
- [Prohousing Designation](#) free technical assistance to gain designation and bonus points for state funding programs.

- [Housing Element Educational Video](#) for the 6th cycle housing element update targeting local elected officials, stakeholders, and the public. This video is available for free in English and Spanish with closed captioning. Local governments can embed links to the video on their websites.