SAN JOAQUIN COUNCIL OF GOVERNMENTS

Citizens Advisory Committee
San Joaquin Council of Governments
555 East Weber Avenue, Stockton, California

Wednesday, May 20, 2020
6:00 p.m.

https://sjcog.zoom.us/j/97724647513

Teleconference Number: 1-669-900-6833
Meeting ID: 977 2464 7513

Note: If you don’t have access to a smart device or a computer with a webcam & a mic, you can dial in using the teleconference number and meeting ID above.

Attention Callers: Please mute the call unless speaking

NOTICE
Coronavirus COVID-19

In accordance with Governor Newsom’s Executive Order N-33-20, The San Joaquin Council of Governments and staff will be participating in this meeting via teleconference. In the interest of maintaining appropriate social distancing, members of the public may participate in the meeting electronically using the Zoom link, and shall have the right to observe and offer public comment at the appropriate time during this meeting.

We have also provided a call-in number, as identified on this Agenda, and encourage you to attend by telephone.

The San Joaquin Council of Governments is in compliance with the American with Disabilities Act and will make all reasonable accommodations for the disabled to participate in employment, programs, and facilities. Persons requiring assistance or auxiliary aid in order to participate should contact Rebecca Calija at 235-0600 at least 24 hours prior to the meeting.

Note: All items are available for action by the committee. The right hand column identifies staff recommendations.

AGENDA

1. Call to Order

2. Minutes: Approve Minutes of March 18, 2020  

   ACTION
3. Public Comments

At this time the public may address the CAC on any non-agenda item that is within the subject matter of this agency. A five-minute maximum time limit will apply to all public comments.

4. Draft 2019 Measure K Strategic Plan  DISCUSSION
5. 2020 Measure K Ordinance and Expenditure Plan Amendment  ACTION
6. Draft Fiscal Year 20/21 Unmet Transit Needs Report  DISCUSSION
7. 2022 RTP/SCS Briefing: Refining a Regional Approach to Housing  DISCUSSION
8. SJCOG Staff Update
9. Updates / Requests from the Committee
1) Call to Order

Chair Plathe called the meeting to order at 6:00 p.m. via teleconference.

Members Present:

Richard Blackston, City of Lodi; Jim Hilson, City of Lathrop

Members Present via teleconference:

Paul Plathe (Chair), Sierra Club; Leonard Smith, Transit Advocate; Michael Carouba, Business Industry; Stephanie Hobbs, City of Ripon; Lauren Ah Tye, League of Women Votes; Gracie Marx, City of Escalon; Eleassia Davis, City of Tracy; Steve DeBrun, City of Manteca;

SJCOG Staff Present:

David Ripperda, Associate Regional Planner; Christine Haruta, Associate Program Specialist

SJCOG Staff Present via teleconference:

Christine Corrales, Associate Regional Planner; Hailey Lang, Associate Program Specialist

2) Minutes: Approve Minutes of February 19, 2020

A motion was made and seconded (Blackston/Hobbs) to approve the minutes of February 19, 2020. Motion Passed unanimously.

3) Public Comments

None.

4) San Joaquin One Voice® Project Submissions & Regional Priority Selection

Ms. Christine Haruta presented this item. She noted that the SJCOG Board had adopted criteria for Regional Priority projects for One Voice, including limiting the number of regional projects to no more than three, projects should be regional in nature, projects must be ready to utilize federal funding within the time requirements for the grant. Ms. Haruta stated that SJCOG staff were recommending the International Park of Commerce Interchanges in Tracy, the State Route 99/120 Interchange Improvements in Manteca, and the Stockton Diamond Grade Separation.

Mr. Leonard Smith expressed his views that the Valley Link project should be prioritized. Committee members and staff explained that the project was not eligible for federal funds and did not meet the criteria adopted by the SJCOG Board. Committee viewpoints included support
for the projects proposed by SJCOG staff, concern that some of the projects may not be helping relieve congestion in the corridor, and discussion that the projects are competing for federal funding and the most competitive projects need to be submitted.

A motion was made and seconded (Blackston/Davis) to approve the staff recommendation. Motion passed 9-1, with Smith dissenting.

5) 2021 Regional Active Transportation Program Draft Guidelines and Application

Mr. David Ripperda presented this item. He noted that for the fifth cycle of the Active Transportation Program staff were recommending doing a combined Call for Projects with Measure K and Congestion Mitigation and Air Quality Improvement Program (CMAQ) funding. Mr. Ripperda explained that SJCOG was required to adopt and submit regional guidelines to the California Transportation Commission for their approval to hold a separate Call for Projects.

A motion was made and seconded (Blackston/Hilson) to approve the staff recommendation to approve the regional ATP guidelines. Motion passed unanimously.

6) Final Congested Corridor Plan

Mr. Ripperda presented this item. He informed the committee that the Draft Congested Corridor Plan was released for comment in November, and the final draft was prepared in February based on comments from agencies. He described the purpose of the plan and the corridor, including I-205, I-5, SR 120, SR 99, and the parallel rail, transit, and local arterials. He noted that there were 53 priority projects in the plan and SJCOG was focusing on the top projects to be complete in the short-term (2025), mid-term (2030), and long-term (2035). Committee discussion included electric vehicles, the decrease in Vehicle Miles Travelled (VMT), and congestion pricing.

A motion was made and seconded (Blackston/Hilson) to approve the staff recommendation to accept the report. Motion passed unanimously.

7) San Joaquin Regional Climate Summit Re-Cap

Ms. Christine Corrales presented this item. She provided a summary of the San Joaquin Regional Climate Summit that was held at SJCOG on February 26th and noted that more than 50 participants attended. Ms. Corrales stated that speakers were included from the Metropolitan Transportation Commission, Caltrans District 10, and the Delta Stewardship Council.

This item was for information only. No action was taken.

8) Update on Activities with Institute for Local Government on Homelessness and Affordable Housing

Ms. Hailey Lang presented this item. She provided a summary of the activities that SJCOG was undertaking with the Institute for Local Government and the local agencies regarding homelessness. Committee members discussed focusing on homelessness and affordable housing, the need to get non-profits involved, and the supply and demand of the housing market.

This item was for information only. No action was taken.
9) SJCOG Staff Update

Mr. Ripperda noted that the SJCOG office would be shutting down due to the COVID-19 situation and that staff would be transitioning to working remotely for the foreseeable future.

10) Committee Updates / Future Agenda Items

Mr. Blackston and Mr. Hilson expressed concerns about driver behavior and lack of enforcement at the new ramp meters along Highway 99. Chair Plathe mentioned the Sierra Club meeting have been cancelled due to COVID-19. Mr. Hilson noted that two members of Congress had contracted COVID-19.

11) Meeting Adjournment

The meeting was adjourned at 6:52 p.m.
AGENDA ITEM 4
STAFF REPORT

SUBJECT: Draft 2019 Measure K Strategic Plan

RECOMMENDED ACTION: Discussion Only

SUMMARY:

Pursuant to the Measure K Renewal Expenditure Plan, a Strategic Plan is to be updated every two years:

SJCOG will prepare a Strategic Plan every two years. The Strategic Plan will be the master document for delivery of the Expenditure Plan projects and can be amended at any time. The purposes of the Strategic Plan are as follows:

- Defines the scope, cost, and schedule of each project
- Identifies accomplishments and critical issues
- Lists a set of amendments to these projects
- Details the revenue projections and possible financing tools needed to deliver the Expenditure Plan
- Gathers into one document the policies and procedures of the Expenditure Plan
- Serves as an annual budget

In January 2020, the SJCOG Board approved keeping the Measure K Renewal revenue estimate at the level, $2.6 billion. While the COVID-19 crisis has had a drastic impact on sales tax revenues it is currently difficult to quantify the magnitude of the economic impacts. Therefore, SJCOG staff proceeded with the Draft 2019 Strategic Plan using the $2.6 billion estimate. This estimate will be reevaluated during Fiscal Year 2020/21 as part of the 2021 Strategic Plan update.

The draft document is available for public review online at https://www.sjcog.org/302/Plans-Publications.

RECOMMENDATION:

Discussion Only.

FISCAL IMPACT:

None at this time. There will be direct fiscal impacts from the adoption of the Measure K Strategic Plan which will set Measure K allocations for eligible projects through Fiscal Year 2030/31.
DISCUSSION:

Throughout spring 2020, SJCOG staff met with all local agencies and transit operators to discuss the implications of the Measure K financial picture and how to prioritize projects. Staff worked with project sponsors to finalize the scope, cost, and schedule of all Measure K projects. In January 2020, the SJCOG Board approved keeping the Measure K Renewal revenue estimate at the level previously adopted in the 2017 Strategic Plan update, $2.6 billion.

In April 2020, SJCOG’s financial consultant PFM completed a cash flow analysis of the Measure K Capital Program based upon existing and future anticipated debt service and revenue as shown in Figure 1. The cash flow analysis indicated that only approximately $74.5 million would be available to program to new Congestion Relief projects between Fiscal Year 2020/21 and Fiscal Year 2030/31. SJCOG developed a preliminary Strategic Plan programming scenario based upon this cash flow analysis and several underlying policies and assumptions.

Figure 1:
Congestion Relief and Railroad Crossing Safety Categories

For the $74.5 million of projected new capital project capacity through FY 2030/31, staff continued to devote the entire amount to the Regional Arterial program, as the Board approved in the previous 2017 Strategic Plan update. No new capacity for the State Highway and Railroad Crossing Safety categories will be available until the last ten years of the program other than any cost savings from existing projects as they are closed out.

Of the 20 Regional Arterial projects shown below, the majority of the projects in the early years of the Strategic Plan period previously were approved for funding by the Board using available cash on hand. These existing projects include:

- Lodi: SR 99/Turner Road Interchange - $3 million for construction
- Manteca: SR 120/McKinley Avenue Interchange - $7.7 million for construction
- Ripon: Stockton Avenue Widening - $2.2 million for construction
- San Joaquin County: Pershing Avenue Widening - $2.364 million for construction
- San Joaquin County: Grant Line Road Corridor - $2.45 million for PS&E
- Stockton: Lower Sacramento Road Widening - $4 million for PS&E
- Tracy: Corral Hollow Road Widening - $13 million for construction

New programming in the early years of the Strategic Plan is very conservative and includes:

- Escalon: Ullrey Ave/McHenry Ave Intersection - $160,000* for environmental and design
- Manteca: SR 120/Main Street Interchange - $250,000 for PSR phase
- Manteca: SR 120/Airport Way Interchange - $250,000 for PSR phase
- San Joaquin County: Grant Line Road Corridor - $6 million* for construction
- Stockton: Pacific Avenue Widening - $250,000 for PSR phase
- Tracy: I-580/International Parkway Interchange - $816,000 for ROW phase and $1,725,000* for construction management

*Due to uncertain cash flow availability, SJCOG staff do not recommend entering into cooperative agreements for funding programmed in Fiscal Year 2021/22 or beyond until the 2021 Strategic Plan.

Starting in Fiscal Year 2025/26, funding is available for the following projects:

- Lathrop: I-5/Louise Avenue Interchange - $3,768,000 for construction
- Lodi: Harney Lane Widening - $3,250,000 for construction
- Lodi: Harney Lane Interchange - $4,000,000 for PSR phase, environmental, and design
- Lodi: SR 12 (Victor Road) Widening - $1,100,000 for PSR phase and environmental
- Ripon: SR 99/Wilma Avenue Interchange - $712,000 for PSR phase and environmental
- Stockton: Pacific Avenue Widening - $3,000,000 for construction
- Stockton: Eight Mile Road Widening - $4,000,000 for PSR phase and environmental
- San Joaquin County: 11th Street Improvements - $5.78 million, PSR through construction
- San Joaquin County: Escalon Bellota Road Widening - $4.7 million for PSR phase through construction
Passenger Rail, Bus, and BRT Subcategories

No significant changes were made to the Passenger Rail, Bus, and BRT Subcategories. No new significant capital expenditures are recommended until after Fiscal Year 2021/22 to ensure that sufficient operating funds are available to sustain critical operations. Measure K funding for the SJCOG Travel Demand Management program is proposed to increase to $1.1 million annually by Fiscal Year 2023/24 through Fiscal Year 2030/31.

SJCOG staff recommends extending the existing Measure K cooperative agreements by one fiscal year rather than entering into new long-term agreements until the financial situation is better understood.

Bicycle, Pedestrian, and Safe Routes to School Subcategory

The Bicycle Pedestrian and Safe Routes to School Competitive Program received an advancement of funding in 2017 through the release of the $8.17 million SJCOG debt service reserve fund. As a result, funding will level out at approximately $988,500 annually from Fiscal Year 2024/25 through Fiscal Year 2040/41.

The Non-Competitive Program requires a “catch up” allocation of $2.7 million in fiscal Year 2021/22 for funding that was not distributed in Fiscal Years 2010/11 through 2015/16, and actual revenue amounts for Fiscal Years 2016/17 through 2020/21. Subsequently, starting in Fiscal Year 2022/23 the funding amount will be equal to the 40% non-competitive share of the projected revenue for the subcategory, growing from $624,127 in Fiscal Year 2022/23 to $1.1 million in Fiscal Year 2039/40.

Smart Growth Incentive Program

No changes are recommended to the programming of the Smart Growth Incentive Program. Off the top allocations will continue to increase by 4.5% annually through Fiscal Year 2040/41 to meet the $65 million requirements of the program.

Local Roadway Repair and Local Roadway Safety Program

No changes are recommended.

BACKGROUND:

Measure K is the half-cent sales tax dedicated to transportation projects in San Joaquin County. With its original passage in November 1990, Measure K began laying the groundwork for funding for a system of improved highways and local streets, new passenger rail service, regional and inter-regional bus routes, new bicycle facilities, and railroad crossings.
Measure K Renewal: On November 7, 2006, San Joaquin County voters decided to extend Measure K for an additional 30 years.

The categorical allocations of Measure K Renewal (hereafter referred simply as Measure K) include Local Street Repairs and roadway Safety (35%), Congestion Relief projects (32.5%), Railroad Crossing Safety Projects (2.5%), and Passenger Rail, Bus, and Bicycles (30%), which includes subcategories for Rail Transit, Bus Transit, Bus Rapid Transit, and Bicycle, Pedestrian, and Safe Routes to Schools improvements.

The renewal of Measure K was initially estimated to generate $3 billion, but current estimates as of January 2020 are at $2.6 billion, representing a $370 million decrease.

Measure K Strategic Plan:

The Measure K Strategic Plan serves as the guiding document for the delivery of Measure K (Renewal) projects and programs. The Strategic Plan functions as a Measure K capital improvement program (CIP) for all eligible categories approved by San Joaquin voters. Its financial plan describes the long-term revenue forecast, capital funding requirements, borrowing needs, and the associated debt service costs of the program. The current version of the Plan, the 2017 Measure K Strategic Plan, provides a twenty-year outlook of Measure K projects through Fiscal Year 2030/31.

The San Joaquin Council of Governments (SJCOG) is the administrator of the Measure K half-cent sales tax program. Due to the decrease in revenue from the Great Recession and the COVID-19 crisis, not all Measure K projects identified in the Expenditure Plan can be funded in the 30-year life of the sales tax program. The region will need to delve into difficult policy decisions and make hard choices on what Measure K projects can be funded. This means Measure K expenditures, project priorities, and policies will be re-examined and possibly new policies developed to create a financially constrained plan that balances project delivery within funding limitations.

SCHEDULE:

Prepared by: David Ripperda, Associate Regional Planner
AGENDA ITEM 5
STAFF REPORT

SUBJECT: 2020 Measure K Ordinance and Expenditure Plan Amendment

RECOMMENDED ACTION: Recommend to the SJCOG Board that they amend the Measure K Renewal Ordinance to revise the Regional Congestion Management Plan language as shown in Attachment B.

SUMMARY:

On February 4, 2020, SJCOG announced the annual process for interested parties to submit proposals for amendments to the Measure K Ordinance and Expenditure Plan. SJCOG staff evaluates all proposals based upon project merits, project readiness, regional significance, and fiscal impact on the delivery of the Measure K Program. SJCOG received no requests in writing from any interested parties prior to the deadline of March 31, 2020. Given the COVID-19 situation, SJCOG staff reached out to staff at the local agencies and confirmed that no amendments to the Measure K Ordinance and Expenditure Plan were being requested at this time.

In December 2019, the SJCOG Board approved starting the process of “opting-out” of the state Congestion Management Program (CMP). This was due to the change in state law that requires switching from analyzing level of service (LOS) to Vehicle Miles Traveled (VMT) for traffic impact analysis. “Opting-out” of the state CMP requirements is the first task in building a platform to consider new ways of measuring transportation system performance along with VMT that complement efforts to combat climate change, support sustainable, vibrant communities, and improve mobility. However, SJCOG compliance with the federal Congestion Management Process is still required under federal law.

To complete the opt-out process it is now necessary to amend the Measure K Renewal Ordinance to revise the Regional Congestion Management Plan language as shown in Attachment B.

RECOMMENDATION:

SJCOG recommends that the Citizens Advisory Committee recommends to the SJCOG Board that they amend the Measure K Renewal Ordinance to revise the Regional Congestion Management Plan language as shown in Attachment B.
FISCAL IMPACT:

None at this time.

BACKGROUND:

In 2006, the voters of San Joaquin County renewed the Measure K half-cent sales tax program for 30 years through 2041. The Measure K Expenditure Plan calls for local streets and roads repair, projects to reduce congestion on streets and highways, passenger rail and bus service, as well as railroad grade separations. There is a provision in Measure K that allows for amendments to the Ordinance and Expenditure Plan every fiscal year.

NEXT STEPS:

The SJCOG Board will consider this request to amend the Measure K Expenditure Plan at a public hearing on May 28, 2020. If the Board approves the amendment request, SJCOG staff will notify all cities in San Joaquin and the County of San Joaquin of the Board action.

As described in Section 9: Amendments the Measure K Ordinance, subsection 9.03,

In the event that a local jurisdiction does not agree with the Authority's amendments(s), the jurisdiction's policy decision-making body must, by a majority vote, determine to formally notify the Authority of its intent, in writing by registered mail, to obtain an override of the Authority's amendment(s). The appealing jurisdiction will have 45 days from the date the Authority adopts the proposed amendment(s) to obtain resolutions supporting an override of the amendment(s) from a majority of the cities representing a majority of the population residing within the incorporated areas of the county and from the Board of Supervisors. If a jurisdiction does not obtain the necessary resolutions supporting the override, the Authority's amendment(s) to the Ordinance will stand. If the necessary resolutions supporting the override are obtained within 45 days from the date the Authority adopts the proposed amendment(s), then the amendment(s) shall not become effective.

ATTACHMENTS:

A. 2020 Measure K Ordinance and Expenditure Plan Amendment Process

B. Revised Regional Congestion Management Plan Language

Prepared by: David Ripperda, Associate Regional Planner
In February, SJCOG sends out letter to local jurisdictions soliciting proposals to amend Measure K Ordinance and Expenditure Plan.

In April, SJCOG staff analyzes the proposals and fiscal analysis to develop recommendations for Committees.

March 31, 2020
Deadline for Interested parties to submit proposals to amend Measure K Ordinance and Expenditure Plan.

May
Committee input on Measure K Ordinance and Expenditure Plan Amendments

May 28, 2020
SJCOG Board holds a public hearing on the proposed amendments. Upon completion of the hearing, the amendments must be passed by a roll call vote and must have two thirds majority of concurrence.

45 days following notice of SJCOG Board Action
In the event that a local jurisdiction does not agree with the amendments, it must, by majority vote, notify SJCOG via mail, of their intent to obtain an override of the amendments from a majority of the cities representing a majority of the population residing within the incorporated areas of the county and from the Board of Supervisors, 45 days after SJCOG provides notification of amendment.
MEASURE K RENEWAL CMP REQUIREMENTS

SECTION 7. REGIONAL CONGESTION MANAGEMENT PLAN

7.01 The Authority must have in place and be fully implementing a Regional Congestion Management Plan by January 1, 2008.

7.02 The primary goals of this Plan shall include:

(a) Monitoring Vehicle Mile Traveled (VMT) as a key indicator of growth and jobs/housing targets.
(b) Adopting programs that strive to keep the increase in VMT to an annual rate that is equal or less than the population increase.
(c) Supporting and planning for improved heavy passenger rail and regional bus connections with the Bay Area and Sacramento.
(d) Ensuring new development contributes a fair share and provides transportation improvements at the time of new construction.

7.03 The Regional Congestion Management Plan shall be in compliance with the federal Congestion Management Process. The following:

(a) Traffic Level of Service standards for all regional roadway facilities.
(b) Standards for the frequency and routing of public transit.
(c) A trip reduction and travel demand element that promotes alternative transportation modes.
(d) A program to coordinate the development review process to reduce automobile trip generation from newly developed residential and employment centers.
(e) The San Joaquin Council of Governments will review all environmental documents and/or development applications for residential, commercial, retail, and industrial development in San Joaquin County generating 125 or more peak hour trips, based on ITE factors. The San Joaquin Council of Governments will comment on each of these developments as to their impact on the region and recommend the appropriate mitigation to address the impacts the new development will have on the existing transportation system. The San Joaquin Council of Governments will coordinate with the California Department of Transportation on these comments.
(f) Use of a regional transportation and traffic computer model and database to determine the quantitative impacts of traffic from new and existing development on the regional transportation system.

7.04 An Annual Report will be produced and adopted by the Authority determining the compliance of all local agencies and the San Joaquin Council of Governments with sections 7.01 through 7.03. Should a local agency fail to comply with the requirements of this section that agency will be suspended from being allocated Congestion Relief funds for new projects until found to be in compliance. Should the San Joaquin Council of Governments fail to comply with the requirements of this section the agency will suspend expenditure of the 1% administrative funds until compliance is achieved.
STAFF REPORT

SUBJECT: Draft FY 20/21 Unmet Transit Needs Report

RECOMMENDED ACTION: Discussion

SUMMARY:

Each year, pursuant to state law, the Transportation Development Act (TDA), as the Regional Transportation Planning Agency, the San Joaquin Council of Governments (SJCOG) must identify any unmet transit needs that may exist in San Joaquin County. If needs are found, SJCOG must determine whether those needs are reasonable to meet. SJCOG must ensure that reasonable needs are met before TDA funds are allocated to local jurisdictions for non-transit purposes.

The unmet transit needs assessment requires SJCOG to meet the following requirements:

- Ensure that several factors have been considered in the planning process, including:
  1. Size and location of groups likely to be dependent on transit,
  2. Adequacy of existing services and potential alternative services
  3. Service improvements that could meet all or part of the travel demand.
- Hold a public hearing to receive testimony on unmet needs.
- Determine definitions for "unmet transit needs" and "reasonable to meet."
- Adopt a finding regarding unmet transit needs and allocate funds to address those needs, if necessary, before street and road TDA allocations.

This year’s assessment included nine public hearings, an online survey posted on SJCOG’s website, and paper submissions, producing a total of 107 comments on transit service from specific individuals.

After review of all comments with the Social Services Transportation Advisory Committee, SJCOG found no unmet transit needs recommended be found reasonable to meet. The report is available on SJCOG’s website: https://www.sjcog.org/UTN.

RECOMMENDATION:

BACKGROUND:

At the request of the SSTAC, SJCOG formed a subcommittee to review the adopted definitions of “unmet transit need” and “reasonable to meet”. The updated definitions as proposed by the subcommittee and adopted by the Board in February 2018, are as follows:

Unmet Transit Needs are defined as transportation services not currently provided to those residents who use or would use public transportation regularly, if available, to meet their life expectations.

- Shopping
- Medical
- Dental
- Employment
- Personal Business
- Education
- Social Services
- Recreation
An unmet transit need that meets the definition above and meets all the following criteria shall be considered **reasonable to meet**:

### Community Acceptance
There should be a demonstrated interest of citizens in the new or additional transit service (i.e. multiple comments, petitions, etc.).

### Equity
The proposed new or additional service will benefit the general public, residents who use or would use public transportation regularly, the senior population, and persons with disabilities; including assessments based on Title VI or other similar information where available.

### Potential Ridership
The proposed transit service will meet new service ridership performance measures of the implementing agency or agencies, as defined by the implementing agency or agencies in concurrence with the Social Services Transportation Advisory Committee (SSTAC).
Within the definition, an unmet transit need cannot be found unreasonable solely based upon economic feasibility.
Operational, Educational, and Non-Specific Comments on Transit Service

The annual Unmet Transit Needs process provides a broad opportunity for the public to provide input on transit services in San Joaquin County. As a result, comments are often submitted that do not meet the definition of unmet transit needs provided above. These comments generally fall in the following categories:

- **Operational Comments**: Request an improvement to an existing transit service, such as increased frequencies, additional stops.
- **Educational Comments**: Request transit service that already exists.
- **Non-Specific Comments**: Do not provide enough information to identify an unmet transit need. Examples include comments that only describe the commenter's desired destination in general terms (e.g., "school" or "work") without providing a location.

Although these comments cannot be considered unmet transit needs and thus are not evaluated as to whether they are “reasonable to meet,” they still provide valuable input on transit service. SJCOG forwards all comments to the relevant transit operators, who consider them when developing service improvements or providing educational materials to the public.
DISCUSSION:

Public Input

This year’s Unmet Transit Needs process included an extended public outreach process using new techniques to gain public input. These efforts were intended to promote multiple opportunities for members of the public to communicate their unmet transit needs (e.g., SJCOG website, survey, social media, phone). Examples of this effort include:

- Nine public hearings held throughout San Joaquin County, including at least one hearing in each jurisdiction
- Attending community events and reaching out to local organizations
- An online survey was posted on the SJCOG website and e-blasted to interested parties

The various community outreach efforts produced a total of 107 comments on transit service.

Analysis of Comments Received

SJCOG convened a UTN Review Subcommittee consisting of seven members of the SSTAC (including RTD, other transit operators, and social service providers). Most comments were deemed to fall into the Operational, Educational, or Non-Specific categories defined above, and as such were not considered unmet transit needs. These comments will be forwarded to the appropriate transit operators for consideration in service planning.

Findings

Based on the analysis described above, SJCOG recommends the following Unmet Transit Needs Findings for FY 20/21:

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<tr>
<th>Jurisdiction</th>
<th>Unmet Need, determined Not Reasonable to Meet</th>
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<tr>
<td>Lathrop</td>
<td>Loop route from Generations Center to City Hall</td>
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<td>Lathrop</td>
<td>Route connecting Lathrop and Manteca</td>
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<td>Lodi</td>
<td>Service to/from City Council meetings</td>
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<td>Lodi</td>
<td>Service to Micke Grove Park</td>
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<td>Lodi</td>
<td>Increased service connecting Stockton and Lodi</td>
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<td>Lodi</td>
<td>Service connecting 711 Cross St and 1400 Tenth St in Lodi</td>
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<td>Stockton</td>
<td>Transportation to Micke Grove on weekends</td>
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<td>Stockton</td>
<td>Increased weekend service to San Joaquin RTC</td>
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<tr>
<td>Stockton</td>
<td>Increased weekend service to Sherwood Mall</td>
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<tr>
<td>Stockton</td>
<td>Service from Feather River Drive to Pacific and Alpine</td>
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<tr>
<td>Stockton</td>
<td>Service from Feather River Drive to Pershing and Alpine</td>
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<td>Stockton</td>
<td>Additional night service on Route 23, and other routes to Lodi at night.</td>
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<td>Tracy</td>
<td>Service at Morehead trailer park on Chrisman Road</td>
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<td>Service from Mountain House to Stockton</td>
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<td>Service from Mountain House to El Concilio in Tracy</td>
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<td>Tracy</td>
<td>Service to Safeway Depo Area</td>
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<td>Tracy</td>
<td>Route connecting Tracy and Manteca</td>
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<td>Tracy</td>
<td>Service from Tracy to Blackhawk</td>
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<td>Tracy</td>
<td>Mountain House to 11th Street Tracy</td>
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<td>Manteca</td>
<td>Route connecting Lathrop to Manteca</td>
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<td>Manteca</td>
<td>Route connecting Tracy and Manteca</td>
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ATTACHMENTS

None.

Report prepared by Ryan Niblock, Senior Regional Planner
STAFF REPORT

SUBJECT: 2022 RTP/SCS Briefing: Refining a Regional Approach to Housing

RECOMMENDED ACTION: Discussion

SUMMARY:

With increasing importance and urgency in California placed on addressing housing issues, there will be a need for additional support of local communities to meet housing needs. Both recent legislative action and the governor’s priority policy goals will push regional agencies into a more active role in this arena. The question for the agency and its policymakers is how should we shape this role to best serve communities in San Joaquin County?

To provide better information on the regional dynamics of housing and homelessness issues, this briefing packet includes:

• An overview of recent statewide legislative efforts to address the housing and homelessness crisis;
• An orientation on the current role of SJCOG and its programs and activities related to housing and homelessness in the region;
• A look at regional data on the state of housing affordability and homelessness in San Joaquin County; and
• A preliminary discussion of the AB 101 REAP program and opportunities to shape a regional approach to housing in San Joaquin County and across the Central Valley.

Below are four key priorities highlighted in this briefing, fully described in Section VI., Emerging Regional Role in Housing of the Housing Policy Briefing document:
1. Development of a Regional Housing Trust Fund
2. Streamlining the Development Process
3. Planning and Coordination to Develop a Regional Project Pipeline
4. Supporting Local Jurisdictions Impacted by COV-19

These priorities are presented for discussion as SJCOG staff seeks guidance from SJCOG Board to develop a program for how the region will utilize its allocation of approximately $843,312 in AB 101 REAP funds.

RECOMMENDATION:

This item is for information/discussion; no action is requested at this time.

BACKGROUND:

Following the adoption of the 2018 RTP/SCS, SJCOG initiated several studies intended to not only meet new federal and state planning requirements but also gain a better understanding of emerging issues for future transportation planning. Funded by SB1 Formula Planning funds, eight of these studies are currently underway. To keep SJCOG’s committees, the Board, and the public aware of progress, staff will be presenting information in the form of issue briefings. Besides the direct connection to on-going studies, the presentations will also be responsive to previous Board member questions and present new information for discussion. The intent of the series is to encourage dialogue on emerging transportation issues for the 2022 RTP/SCS.

FUTURE BRIEFING SCHEDULE AND NEXT STEPS:

<table>
<thead>
<tr>
<th>Topic / Study / Planning Activity</th>
<th>Tentative Date</th>
</tr>
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<tbody>
<tr>
<td>Transportation Innovation &amp; Technology (completed)</td>
<td>May 2019</td>
</tr>
<tr>
<td>Transportation Resiliency Defined (completed)</td>
<td>June 2019</td>
</tr>
<tr>
<td>Scenario Planning Defined (completed)</td>
<td>February 2020</td>
</tr>
<tr>
<td>Housing</td>
<td>May 2020</td>
</tr>
<tr>
<td>Scenario Development Framework, Action</td>
<td>June 2020</td>
</tr>
<tr>
<td>Preferred Scenario, Draft</td>
<td>April 2021</td>
</tr>
<tr>
<td>Preferred Scenario, Action</td>
<td>August 2021</td>
</tr>
<tr>
<td>-----------------------------------</td>
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<tr>
<td>2022 RTP/SCS, Draft</td>
<td>January 2022</td>
</tr>
<tr>
<td>2022 RTP/SCS, Adoption</td>
<td>July 2022</td>
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</tbody>
</table>

**ATTACHMENTS:**
- Attachment 1. Housing Policy Briefing Packet

*Prepared by Christine Corrales, Associate Regional Planner and Hailey Lang, Associate Regional Planner*
REFINING A REGIONAL APPROACH TO HOUSING

APRIL 2020// PREPARED BY HAILEY LANG, CHRISTINE CORRALES, ASHLEY GOLDLIST, AND ISAIAH ANDERSON
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I. SUMMARY

The purpose of this document is to evaluate and understand SJCOG’s regional role in housing and to provide better information on the regional dynamics of housing and homelessness issues. The briefing overviews statewide legislative effort to address housing and the homelessness crisis as well as the current role of SJCOG and its programs and activities related to housing and homelessness in the region. Additionally, the briefing highlights regional data on the state of housing affordability and homeless in San Joaquin County. Lastly, the briefing begins a preliminary discussion of the AB 101 Regional Early Action Planning (REAP) program and opportunities to shape a regional approach to housing in San Joaquin County and across the Central Valley.

The AB 101 REAP Program presents new opportunities to address housing and homelessness issues as a region. Below are four key priorities to explore, fully described in Section VI., Emerging Regional Role in Housing:

1. **Development of a Regional Housing Trust Fund**: A housing trust fund can be established to support the preservation and production of affordable housing and increase opportunities for families and individuals to access decent affordable homes. REAP funds may be used to develop the framework for a housing trust fund which may entail a rigorous planning process to define the parameters of the program, including goals, administration, fund distribution, as well as funding sources.

2. **Streamlining the Development Process**: While each jurisdiction in the region may be at varying stages of identifying and implementing streamlining in their own departments, REAP funds may be used to support these activities. These may include the preparation of Specific Plans with an accompanying Environmental Impact Report, objective design and/or development standards to comply with SB 35 and provide more certainty for applicants, and other strategies intended to reduce the time for application approval.

3. **Planning and Coordination to Develop a Regional Project Pipeline**: HCD has identified best practices which may elevate regional planning and coordination to support housing development. These best practices include feasibility studies to determine the most efficient locations to site housing, the development of regional toolkits on a variety of housing-specific topics, establishing consulting benches or circuit rider programs to provide targeted technical assistance in housing policy areas, and developing a regional peer-to-peer learning exchange.

4. **Supporting Local Jurisdictions Impacted by COVID-19**: To the extent that REAP funds can be used to support the ongoing activities of local jurisdictions regarding the production of housing, this may be an opportunity to offset any negative impacts introduced by COVID-19.
II. INTRODUCTION

With increasing importance and urgency in California placed on addressing housing issues, there will be a need for additional support of local communities to meet housing needs. Both recent legislative action and the governor’s priority policy goals will push regional agencies into a more active role in this arena. The question for the agency and its policymakers is how should we shape this role to best serve communities in San Joaquin County?

To provide better information on the regional dynamics of housing and homelessness issues, this briefing packet includes:

- An overview of recent statewide legislative efforts to address the housing and homelessness crisis;

**Figure 1: 2017 Legislative Housing Package**
• An orientation on the current role of SJCOG and its programs and activities related to housing and homelessness in the region;
• A look at regional data on the state of housing affordability and homelessness in San Joaquin County; and
• A preliminary discussion of the AB 101 REAP program and opportunities to shape a regional approach to housing in San Joaquin County and across the Central Valley.

As population continues to grow in San Joaquin County, providing adequate housing will continue to be a critical issue. Meeting the housing needs of all types of incomes and households is integral to creating a region that is livable for all residents, economically prosperous, and environmentally sustainable. A significant challenge facing the region is to produce enough new housing units as the population grows, and to provide more affordable housing that matches the needs of current and future residents.

Without better information in San Joaquin County on the regional dynamics of housing affordability, it is difficult for the public, private, and philanthropic sectors to make strategic investments or data-driven policy decisions to reduce homelessness or build affordable housing.

This housing policy paper seeks to frame housing and homelessness issues as regional issues, and to identify potential coordinated strategies, policies, and actions to ensure that San Joaquin County’s regional housing needs are met.

This briefing is the fourth installment in a series that staff will bring to committees and board. The intent of the series is to build understanding and dialogue on emerging issues in regional planning that will help to inform policy recommendations and investments for adoption in the next regional plan.

III. STATEWIDE HOUSING EFFORTS

In response to a continuing statewide housing shortage in California, in September 2017, the California Legislature passed a package of bills with the stated goal of increasing housing production and the percentage of that housing that is affordable, specifically. The 2017 California Legislative Housing Package provided a renewed focus on addressing the housing shortage throughout the state. The package offers an injection of new regulatory and financial resources, and with it, an opportunity to innovate in the way housing is delivered throughout California (Figure 1).

Figure 2 highlights the main legislation from the 2017 Housing Package:

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1 Additional information on all the bills in the California 2017 Legislative Housing Package can be found on the HCD website: http://www.hcd.ca.gov/policyresearch/lhp.shtml.
<table>
<thead>
<tr>
<th>Bill</th>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB 879</td>
<td>New Reporting Requirements</td>
<td>Adds additional reporting on the amount, type, and housing being planned within each jurisdiction. Expands the constraints analysis to include locally adopted ordinances and other issues preventing a jurisdiction from meeting its share of regional housing needs for all income levels and steps to remedy the issue. Requires HCD to complete a development fee study.</td>
</tr>
<tr>
<td>SB 36</td>
<td>Streamlined Approval Process</td>
<td>Takes away discretion for approval or denial of specific types of infill projects for those jurisdictions either not meeting their existing reporting requirements or are not meeting their fair share of total housing or affordable housing.</td>
</tr>
<tr>
<td>SB 828</td>
<td>Land Use and Housing Element</td>
<td>Changes to the RHNA process and how agencies assign the regional housing need for each city and the unincorporated county. Provisions will make it more difficult for jurisdictions to appeal their RHNA numbers and allow for more opportunity for challenge by housing advocacy groups.</td>
</tr>
<tr>
<td>and AB 1771</td>
<td>Updates</td>
<td></td>
</tr>
</tbody>
</table>

Additional Legislation

Below includes additional legislation that is not a part of the 2017 housing legislation package but have since been signed into law. The legislation has been categorized by themes, such as accessory dwelling units (ADUs), streamlining of housing permits and production, and homelessness.
### Accessory Dwelling Units (ADUs)

<table>
<thead>
<tr>
<th>Bill</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB 68</td>
<td>Allows two ADUs on a single lot, as well as multiple ADUs on multifamily lots. Also limits certain design requirements that cities can impose on ADUs and requires ADU approvals to be completed in 60 days.</td>
</tr>
<tr>
<td>AB 671</td>
<td>Requires local governments’ housing plans to encourage affordable ADU rentals and requires the state to develop a list of state grants and financial incentives for affordable ADUs.</td>
</tr>
</tbody>
</table>

*Figure 3: ADU Bills*

### Homelessness

<table>
<thead>
<tr>
<th>Bill</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB 6</td>
<td>Requires the state to create a public inventory of local sites suitable for residential development, as well as state surplus land.</td>
</tr>
<tr>
<td>AB 143</td>
<td>Updates the requirements of local governments' housing plans to address the needs for shelter at a regional level and requires it to be accounted for in the Housing Element of a city or county General Plan.</td>
</tr>
<tr>
<td>AB 1188</td>
<td>Creates a legal framework to allow a tenant, with approval from their landlord, to take in a person who is at risk of becoming homeless.</td>
</tr>
<tr>
<td>SB 211</td>
<td>Authorizes Caltrans to lease its properties to local governments for the purpose of emergency shelters or feeding programs for $1 plus administrative fees.</td>
</tr>
<tr>
<td>AB 1010</td>
<td>Will allow duly constituted governing bodies of a Native American reservation or Rancheria to become eligible applicants to participate in affordable housing programs.</td>
</tr>
</tbody>
</table>

*Figure 4: Homelessness Bills*
<table>
<thead>
<tr>
<th>Streamlining</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bill</strong></td>
</tr>
<tr>
<td>SB 13</td>
</tr>
<tr>
<td>AB 881</td>
</tr>
<tr>
<td>SB 330</td>
</tr>
<tr>
<td>AB 1763</td>
</tr>
<tr>
<td>AB 1483</td>
</tr>
</tbody>
</table>

*Figure 5: Streamlining Bills*
Spotlight on AB 101

**AB 101: HOUSING AND HOMELESSNESS BUDGET TRAILER BILL**

*In July 2019, the 2019-20 budget trailer bill (AB 101) passed in the state legislature. The bill provides $2.5 billion in funding to address California’s housing and homelessness crisis. The bill incentivizes cities and counties to increase housing production, establishes a process for a court to determine that a city or county has complied with housing element law; and imposes penalties, as a last resort, if cities and counties disregard the direction of a court and continue not to fulfill their responsibilities under housing element law. Penalties to non-compliance with housing element law do not include a tie to SB 1 transportation funding.*
The $2.5 billion in funding to address California’s housing and homelessness crisis includes $250 million in planning grants between regional governing entities and local jurisdictions. Specifically, the measure provides $125 million to regional entities and $125 million to local jurisdictions to accelerate housing production through technical assistance, preparation and adoption of planning documents, and process improvements and facilitate compliance to implement the sixth cycle of the Regional Housing Need Assessment process. For further discussion on AB 101 regional funds, see Section VI.

To address homelessness at the local level, AB 101 makes $650 million available for one-time grants to cities, counties, and continuums of care to support regional coordination, expand or develop local capacity, and address immediate homelessness challenges. AB 101 funds expire in 2023. All awards will be based on the applicant’s proportionate share of the state’s total homeless population:

- $275 million will be available to cities or a city and county that has a population of more than 300,000.
- $175 million will be available to counties.
- $190 million will be available to continuums of care.

AB 101 also requires a low barrier navigation center to be permitted as a “use by right” if it meets specific requirements. Low barrier shelters remove as many pre-conditions to entry as possible and respond to the needs and concerns of people seeking shelter. Within 30 days of receiving an application for a center, a city must notify the applicant whether the application is complete. Within 60 days of a completed application, the city must act on the application. Lastly, AB 101 also increases the state low income housing tax credit to $500 million (up from $100 million) for the 2020 calendar year.

IV. SJCOG & HOUSING

As a regional convener, SJCOG has many roles as an agency. Federally designated as a Metropolitan Planning Organization (MPO), SJCOG is comprised of a policy board to carry out transportation planning processes. Similar to MPO responsibilities, SJCOG is also a state designated Regional Transportation Planning Agency (RTPA). RTPAs are also responsible for carrying out transportation planning processes and planning documents. Unrelated to transportation planning, SJCOG is an active Joint Powers Authority (JPA). Created in 1968, SJCOG’s role as a JPA is to foster intergovernmental coordination within San Joaquin County, neighboring jurisdictions, the other regional agencies in San Joaquin Valley, the state of California, and various Federal agencies. Lastly, SJCOG is a Council of Governments (COG), which allows for governance of regional and interlocal issues. The purpose of a COG is to establish a consensus about the needs of an area and the actions needed to solve local, regional, and interlocal problems. While a large portion of SJCOG’s role is related to transportation, SJCOG also carries out a number of activities not related to transportation, such as air quality management, regional planning studies, census data, and regional housing.
Regarding regional housing, SJCOG promotes strategies to increase the supply of, and ensure access to, a variety of housing choices for all residents of the region. As the designated RTPA for San Joaquin County, SJCOG’s role is to administer and allocate federal funds for public transit and road and street projects, as well as adopt a Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS), which considers the integration of state and federal transportation investments with local land use planning. Additionally, the State authorizes SJCOG to determine each local jurisdiction’s “fair share” of affordable housing throughout the region. This section summarizes SJCOG’s existing roles, programs, and activities that concern housing issues in the region.

Regional Housing Needs Assessment

The Regional Housing Needs Assessment (RHNA), mandated by state law, quantifies the need for housing at all income levels and informs local land use planning in addressing existing and future housing needs resulting from population, employment, and household growth.

As the council of governments, SJCOG is responsible for overseeing the process and preparing the RHNA every eight years for the San Joaquin region. The process is initiated by the California Department of Housing and Community Development (HCD), which provides a Regional Housing Needs Determination for the region. The regional determination includes an overall housing need number, as well as the percentage of units required to meet the need across all income levels. SJCOG, with input from elected officials, local staff, and stakeholders, then develops a methodology to distribute to each local government a fair share to meet the total regional housing need. This division should ensure adequate housing affordable for all income levels in the region.

The Regional Housing Need Plan (RHNP) is the official assignment of projected regional housing need totals to the jurisdictions in San Joaquin County across four family income categories defined as Very Low, Low, Moderate, and Above Moderate (Figure 6). Once adopted, each jurisdiction has 18 months to update their Housing Element and zoning ordinances to accommodate its fair share of the region’s housing need. Local communities are also required to report their progress to HCD on an annual basis.
RHNA Process Reform

While cities must demonstrate zoning capacity, the RHNA does not require housing to be built or put aside for low income housing. To address this shortcoming, Governor Newsom has called for a reform to the RHNA. This has resulted in legislation that changed the responsibilities of regional agencies, best demonstrated through a comparison of the 5th RHNA cycle and upcoming 6th cycle. The primary differences between the 5th and 6th RHNA cycles are within the methodology, the appeals process, and the data used to determine the regional housing needs.

The new legislation, specifically SB 828 and AB 1771, revise the data that SJCOG must provide to HCD as part of the RHNA process. The 6th cycle updates the methodology to affirmatively further fair housing, incorporating the rate of overcrowding, the loss of units during an emergency, and the inclusion of SB 375 Greenhouse Gas Reduction Targets. To address the overcrowding and fair housing criteria, the COG is required to “provide data on the overcrowding rate for a comparable housing market…and define the vacancy rate for a healthy rental housing market…, no less than 5%” (SB 828). Furthermore, AB 1771 requires “the COG to consider the overcrowding rate and the percentage of existing households…that are paying more than 30% and 50% of their income in rent.” AB 1771 additionally requires the COG to “include the loss of units during a state of emergency that have not been rebuilt or replaced at the time of the data request”. The data is intended to better inform HCD’s determination of housing needs for each region.

The reformed RHNA process will also allow more opportunities for public comment, increase HCD’s ability to adjust RHNA methodology developed by SJCOG, and limit the ability of local jurisdictions to appeal their targets. The 6th RHNA Cycle introduces a new time frame for the appeal process and the enforcement capacity of state housing-planning by HCD. SB 828 changes the basis for appeals by allowing appeals to consider advancing fair housing, allowing other jurisdictions to file an appeal, and forbidding underproduction of units from prior cycles. In

### Table: 2014 RHNA Allocations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Extremely Low ($16,129 &amp; below)</th>
<th>Very Low ($16,130 to $26,882)</th>
<th>Low ($26,883 to $43,011)</th>
<th>Moderate ($43,012 &amp; $64,517)</th>
<th>Above Moderate ($64,518 &amp; above)</th>
<th>Total RHNA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Escalon</td>
<td>60</td>
<td>43</td>
<td>66</td>
<td>64</td>
<td>192</td>
<td>425</td>
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<td>Lathrop</td>
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<td>493</td>
<td>759</td>
<td>957</td>
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<td>Lodi</td>
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<td>Manteca</td>
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<td>466</td>
<td>693</td>
<td>825</td>
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<td>Ripon</td>
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<td>215</td>
<td>231</td>
<td>726</td>
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<td>Stockton</td>
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<tr>
<td>Tracy</td>
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<td>467</td>
<td>705</td>
<td>828</td>
<td>2,463</td>
<td>4,976</td>
</tr>
<tr>
<td>SJ County</td>
<td>1,257</td>
<td>1,239</td>
<td>1,727</td>
<td>1,724</td>
<td>4,220</td>
<td>10,167</td>
</tr>
<tr>
<td>Total</td>
<td>4,888</td>
<td>4,597</td>
<td>6,500</td>
<td>7,066</td>
<td>17,310</td>
<td>40,360</td>
</tr>
</tbody>
</table>

Figure 6: 2014 RHNA Allocations
previous cycles, the COG was permitted to include prior underproduction of housing as justification for reduced regional housing need. Under the 6th cycle this is no longer the case and appeals may not be based on voter approved measures that restrict residential permits issued. The comment period of the draft housing allocation is changed from 60 days to 45 days to propose for more housing in other cities and an additional 45 days are added for the HCD and COG to review the appeals under AB 1771. Lastly, it makes it more difficult for a jurisdiction to deny a housing project if the project contains a certain percentage of affordable housing, under SB 35. SB 35 creates a $10,000 penalty on cities or counties that deny new homes for affordable to low income people.

All together, these reforms aim to transform the RHNA process into a data-driven planning exercise. As a result, SJCOG anticipates that RHNA targets will increase in the next cycle, with limited regional or local jurisdiction discretion in determining what those targets may look like. To demonstrate the impact, Figure 7 compares the 5th and 6th Cycle RHNA Determinations for several jurisdictions currently in the process:

![RHNA Determination Across Recent Cycles](image)

Figure 7: RHNA Process
- **SCAG Case Study:** The Southern California Association of Governments is about to begin their 6th RHNA Cycle, planned for adoption in October 2020. This planning period will be from October 2021 to 2029. In this 6th Cycle, draft methodology factors will focus on household growth, job accessibility and transit access. This is an expansion of factors from previous RHNA cycles where household growth trends were the main focus in the methodology.

- **SANDAG Case Study:** The San Diego Association of Governments Board of Directors approved the final methodology for its 6th RHNA Cycle and released the draft housing unit allocation as of November 2020. The methodology includes an allocation of 65% of housing units near areas of the region with significant transit investments, an allocation of 35% of housing units will go to jurisdictions based on the total number of jobs in their jurisdiction, as well as the application of an equity adjustment to address fair housing and patterns of segregation.

- **SACOG Case Study:** In March 2020, the Sacramento Area Council of Governments adopted its 6th RHNA Cycle Regional Housing Needs Plan. The final methodology uses a two-step process to: (1) calculate each jurisdiction’s total RHNA based on their proportion of growth in SACOG’s adopted 2020 MTP/SCS; and (2) calculate the percentage of low-income units in each jurisdiction based on three adjustment factors. The adjustment factors consider regional income parity, affirmatively furthering fair housing, and jobs/housing fit.

- **ABAG Case Study:** In its 5th RHNA Cycle, the Association of Bay Area Governments allocation formula placed greater weight on household growth, as well as existing employment and employment growth. To a lesser extent, household and employment growth near transit was factored into the allocation formula. The allocation methodology intended to allocate units where local jurisdictions were planning housing growth, as well as allocate units to areas with good transit access. In Fall 2019, ABAG initiated its 6th RHNA Cycle process with scheduled adoption in Fall 2021.

- **AMBAG Case Study:** The Association of Monterey Bay Area Governments 6th RHNA Cycle is for the planning period 2024 to 2032. AMBAG is currently in the late stage of its 5th RHNA Cycle, scheduled to end on December 31, 2023. The 5th Cycle Allocation total for AMBAG was 10,430. The methodology for this cycle is based on household growth and size trends, rate of formation and headship rates, vacancy rates, characteristics in population composition, and relationship of jobs and housing. Besides the state mandated factors, AMBAG made factor adjustments based on surveys from local jurisdiction.

SJCOG will be overseeing the 6th Cycle RHNA, which will cover the planning period from 2024 through 2032.
The tentative schedule is as follows:
- Late 2020: Begin RHNA discussions and methodology development
- September 2021: Deadline for HCD to provide RHNA determination to SJCOG
- January 2022: Draft RHNA Plan released
- June 2022: Final RHNA Plan approved
- December 2023: Local Jurisdiction Housing Element Update Deadline

Additional Housing-Related Activities and Programs

In 2008, the State of California passed Senate Bill 375, the Sustainable Communities and Climate Protection Act. The goal of SB 375 is to reduce greenhouse gas emissions from passenger vehicles and light trucks through integrated transportation, land use, housing, and environmental planning. Under the law, SJCOG must develop a Sustainable Communities Strategy (SCS) along with the RTP, and the Plan must show that it meets per capita greenhouse gas reduction targets set by the state.

Through this role, SJCOG promotes and assists local communities to implement the RTP/SCS. Providing housing plays a key role in the Plan, and SJCOG has sought ways to support its member agencies and local community partners with technical assistance to increase housing production to meet the region’s needs (Figure 8).
<table>
<thead>
<tr>
<th>Technical Assistance Activities</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Affordable Housing and Sustainable Communities Program</strong></td>
<td>• Assist lead developer, transit agencies, and local jurisdiction in scoping sustainable transportation components for project applications. As well as provide support in reviewing applications for submittal.</td>
</tr>
</tbody>
</table>
| **BOOST Pilot Program** | • Partnership with Institute of Local Government (ILG) to convene with the local jurisdictions to discuss the regional issue of homelessness and housing affordability  
  • Work products from these efforts include a ‘best practices’ symposium that will result in a white paper. |
| **Community, Diversity, & Displacement Study** | • A review of housing affordability trends may show how displacement and gentrification can be addressed as well as other community needs.  
  • The relationship between gentrification, displacement, and housing affordability includes a strong emphasis on how regional economic and racial disparities are impacted by transportation and housing investment decisions. |
| **Mayor’s Task Force on Affordable and Workforce Housing** | • Participate in developing policy and program recommendations for City of Stockton related to increasing production of affordable housing, preserving existing affordable housing, and tenant protections. |
| **Regional Early Action Planning (REAP) Program (For further discussion, see Section VI.).** | • REAP provides grants to councils of governments and other regional entities for technical assistance, preparation, and adoption of planning documents and process improvements to accelerate housing production and facilitate compliance to implement the sixth cycle of the regional housing needs allocation.  
  • The San Joaquin Valley will receive a total allocation of $18,975,323. San Joaquin Valley MPO’s are eligible for up to 25% of the funding. SJCOG will receive $843,311.59, based on share of population. The San Joaquin Valley MPOs plan to allocate funds to its RHNA process, sub-allocate to its County and Cities, and develop a “white paper”. |
| **South Stockton Promise Zone** | • Serve as facilitator of working group focused on neighborhood transformation in the region’s most disadvantaged communities.  
  • Working group membership includes affordable housing developers, economic development interests, community and environmental health advocates. |
| **SJCOG Speaker Series** | • SJCOG offered a speaker series related to regional housing affordability in conjunction with University of the Pacific’s (UOP) Center for Business and Policy Research. |

*Figure 8: SJCOG Technical Assistance*
V. HOUSING AFFORDABILITY & HOMELESSNESS IN SAN JOAQUIN COUNTY

Housing affordability is a growing problem within San Joaquin County. Over the years, home ownership rates have decreased and the percentage of residents that are rent burdened are increasing. Similarly, Figure 9 shows the challenges related to housing costs categorized by housing demand and housing supply. All of these factors directly affect housing costs, especially in the San Joaquin County region. In 2018, the California Housing Partnership Corporation and the California Coalition for Rural Housing released a study regarding housing affordability in San Joaquin County. Among the findings in the report:
a. San Joaquin County needs more than 24,000 new units to meet the demand for affordable housing.

b. County renters must earn close to $30 an hour — nearly $60,000 a year — to afford the median rent of $1,505 a month, $18,060 a year. The median household income of San Joaquin County is $53,274.

c. The lowest-income renters in the county spend nearly two-thirds of their salaries on rent, leaving little for other essentials.

As discussed in Section IV, SJCOG develops and adopts a Regional Housing Needs Allocation (RHNA) every eight years to determine how many new housing units each jurisdiction in San Joaquin County should build to ensure housing remains accessible and affordable for its growing population. These housing construction targets are determined based on population and employment forecasts. For 2014 to 2023, the RHNA determined that 40,360 new units should be constructed in San Joaquin County to accommodate expected population growth. As of 2019, however, only 15,594 new housing units were built. At the current building rate, there will be a significant housing supply gap of over 20,000 homes at the end of the RHNA cycle in 2023 (Figure 10).
Because of the shortage in housing units, the lowest income households are disproportionately and severely cost burdened. In 2017, the California Housing Partnership found 76% of extremely low-income households were paying more than half of their income on housing costs compared to just 3% of moderate-income households in San Joaquin County (Figure 11). To afford the median asking rent of $1500 a month in San Joaquin County, renters must earn 2.5 times the minimum wage. A combination of these factors makes securing housing a very challenging endeavor for many households in San Joaquin County, indicating that a significant number of San Joaquin County residents are at risk of homelessness.

Figure 11: Cost-Burdened Individuals
In 2019, San Joaquin Continuum of Care reported a drastic increase in the number of people living unsheltered throughout San Joaquin County. Overall, the 2019 point-in-time count found 1,558 unsheltered homeless residents in San Joaquin County -- the count was 567 in 2017 (Appendix A). While it is widely accepted that unsheltered homelessness has increased in San Joaquin County since 2017, the San Joaquin Continuum of Care attributes the nearly 170% increase in 2019 to the unprecedented turn out of volunteers. Over 400 volunteers helped survey the unsheltered population throughout San Joaquin County in January 2019, leading to a more accurate reflection of the number of unsheltered homeless.

According to the San Joaquin Continuum of Care, the unsheltered homeless living in San Joaquin County remain mired in long-term homelessness and face significant individual barriers to obtaining stable housing, including a lack of income, lack of recent housing and employment history, criminal history, profound physical and mental health challenges, and struggles with substance abuse. Besides individual challenges, systemic barriers persist with a lack of adequate affordable housing across the region.

As briefly discussed in Section IV. SJCOG has partnered with Institute of Local Government (ILG) to be a part of the BOOST pilot program. The BOOST pilot program has a goal of convening local jurisdictions to discuss the regional issue of homelessness and housing affordability. Once thought of as an inner-city issue, homelessness is a concern for every San Joaquin County community, small and large, urban, suburban, and rural. While housing costs are one of the myriad of reasons people experience homelessness, there is a close correlation between the growing number of people experiencing homelessness and rising housing costs.

SJCOG and ILG are working to build relationships and productive partnerships among local jurisdictions in the San Joaquin region on the subject of homelessness and convene experts and strategic partners to build the capacity, skills, and knowledge needed to develop solutions. These efforts will increase understanding of local and regional efforts to address homelessness and will support the implementation of a forthcoming regional homelessness strategic plan.

For current research that SJCOG staff has conducted related to housing affordability and homelessness, refer to Appendix A.

VI. EMERGING REGIONAL ROLE IN HOUSING

As housing affordability and availability issues grow regionally, SJCOG is becoming increasingly involved in housing discussions, which have normally been kept at the local level. With the advent of AB 101 and the Regional Early Action Planning (REAP) Program\(^2\), regional agencies like SJCOG will, for the first time, be receiving planning grants to accelerate housing production as well as facilitate compliance to implement the sixth cycle of the Regional Housing Needs Allocation (RHNA).

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\(^2\) California Department of Housing and Community Development. Regional Early Action Planning (REAP) Grant Program Details. Link to access: [https://www.hcd.ca.gov/grants-funding/active-funding/reap.shtml#activities](https://www.hcd.ca.gov/grants-funding/active-funding/reap.shtml#activities)
Administered through HCD, the San Joaquin Valley will receive a total allocation of $18,975,323 in REAP funds. Of the total allocation, $6 million was set aside in statute for Valley wide collaborative projects. AB 101 requires the eight San Joaquin Valley RTPAs to form a working group of not less than three representatives per county to direct how REAP funds should be apportioned and spent. The SJV REAP Committee held its first meeting in January 2020 and approved an initial grant application to HCD for 25 percent of the REAP allocation to the San Joaquin Valley, approximately $4.7 million. SJCOG will receive approximately $843,312, its population share of the $4.7 million approved by HCD in April 2020. According to HCD guidelines, a council of governments that receives an allocation of REAP funds shall establish priorities and use those moneys consistent with priorities. Funds must be used for housing planning activities and demonstrate a nexus to increasing housing planning and accelerating housing production.

The San Joaquin Valley REAP Committee for Housing recommended that each MPO receiving its share of the Initial Funding Application use funds to conduct the following:

1. Allocate funds to its RHNA (regional housing needs allocation) process
2. Sub-allocate funds to its County and Cities
3. Allocate up to $500,000 overall for:
   b. Fresno COG administration costs as the fiscal agent for the Valley
   c. Other activities that are “Valley wide” in scope.

Therefore, to receive the allocation of $843,312 in REAP funds, the SJCOG Board shall establish priorities and use those monies consistent with priorities. With direction and guidance from the Board, SJCOG staff will develop a program budget in accordance with the San Joaquin Valley REAP Committee recommendations above and establish SJCOG Board priorities as guidelines for use of funds by the County and Cities.

Three preliminary priorities have already been informed directly by regional leaders to accelerate housing production in the region. A fourth priority was added by SJCOG staff in light
of potential COVID-19 impacts to local jurisdictions. These priorities are outlined in this section and are intended to provide a starting point for discussion with the Board. There may also be interest in exploring other potential uses of the REAP funds. Section VII includes a brief summary of best practices to supplement a robust discussion.

Development of a Regional Housing Trust Fund

Funding for affordable housing has significantly declined since 2007 making it extremely difficult to build. Affordable housing developers in the region have consistently expressed the need to enhance and expand local programs to close the gap in financing projects and provide much-needed leverage to compete for other funds. A housing trust fund can be established to support the preservation and production of affordable housing and increase opportunities for families and individuals to access decent affordable homes. While ineligible to seed a housing trust fund, REAP funds may be used to develop the framework for a housing trust fund which may entail a rigorous planning process to define the parameters of the program, including goals, administration, fund distribution, as well as funding sources. Additionally, housing trust funds are distinct funds established by city, county or state governments that receive on-going dedicated sources of public funding to support the preservation and production of affordable housing and increase opportunities for families and individuals to access decent affordable homes.

Streamlining the Development Process

HCD has emphasized the need for improving development processes through streamlining as an important strategy for reducing the cost of development. While each jurisdiction in the region may be at varying stages of identifying and implementing streamlining in their own departments, REAP funds may be used to support these activities. These may include the preparation of Specific Plans with an accompanying Environmental Impact Report, objective design and/or development standards to comply with SB 35 and provide more certainty for applicants, and other strategies intended to reduce the time for application approval.

Planning and Coordination to Develop a Regional Project Pipeline

In regional transportation planning, a list of projects is developed with the help of various stakeholders in order to coordinate and facilitate the process of funding each project through planning, environmental review, design and engineering, and finally, construction. Analogous to transportation planning, programming, and project delivery, the development of an affordable housing project pipeline may facilitate the project finance process. While there are no precedents for this type of activity in staff’s research, HCD has identified other best practices which may elevate regional planning and coordination to support housing development. These
best practices include feasibility studies to determine the most efficient locations to site housing, the development of regional toolkits on a variety of housing-specific topics, establishing consulting benches or circuit rider programs to provide targeted technical assistance in housing policy areas, and developing a regional peer-to-peer learning exchange.

Supporting Local Jurisdictions Impacted by COVID-19

In addition to the three priorities outlined here, a fourth priority was identified by SJCOG staff in response to the impact COVID-19 may have on local jurisdiction budgets and staffing levels. To the extent that REAP funds can be used to support the ongoing activities of local jurisdictions regarding the production of housing, this may be an opportunity to offset any negative impacts introduced by COVID-19.

VII. LOCAL AND REGIONAL BEST PRACTICES FOR HOUSING

As part of the emerging regional role ushered in by the REAP Program, staff has compiled a list of best practices conducted at the local, regional, and statewide level to further inform Board discussion on how to prioritize the use of funds. It is important to note that SJCOG is already doing similar work to that of other regional planning agencies. Many of the MPO best practices are related to housing policy, research, or information to be applied by local agencies for their own utilization.

Local Best Practices

**Land-use control:** Flexibility in land use regulation can create housing choices, reduce cost, and provide more efficient resource management. For example, allowing for a variety of housing types, such as duplexes, triplexes, fourplexes, and multi-family on identified sites can help to accommodate the local jurisdiction’s lower income RHNA.

**Density bonuses:** The density bonus is the most common form of incentive used by inclusionary housing programs. A density bonus provides an increase in allowed dwelling units per acre (DU/A), Floor Area Ratio (FAR) or height which generally means that more housing units can be built on any given site.
Accessory Dwelling Units (ADUs): Also known as granny flats or in-law cottages, ADUs provide additional housing units at a relatively lower cost.

Incentives for affordable housing: Other incentives may include fee waivers, subsidies, tax abatement, design flexibility, or tax credits.

Infrastructure Planning: Plans for updating infrastructure, especially in areas identified for infill development, can help to lay the groundwork for future development.

Housing task force: The Mayor’s Housing Policy Task Force in San Antonino, Texas is leading a policy-making process to develop housing policy recommendations that will increase the availability of housing that is affordable to all economic segments of the population and address challenges that include gentrification and displacement, rising property taxes, decreasing affordability, neighborhood preservation, low affordable housing production levels, insufficient gap financing, limited capacity, and existing programs that target higher-income households. The process includes a commitment to inclusive community engagement that engenders trust, facilitates open and thoughtful conversations, and identifies innovative solutions.

Regional Best Practices

Miami Valley Regional Planning Commission (MVRPC) Fair Share Program: Covered five counties in southwest Ohio. Used allocation formula to establish fair-share housing goals for planning units by county. Addressed both federally assisted new housing production and rehabilitation. Eventually added an element to address racial barriers to housing choice.

Prioritizing regional centers for investment: This approach prioritizes regional centers and attempts to coordinate housing and other development so more residents can live closer to work or find homes or jobs in walkable neighborhoods with access to public transportation. Many MPOs do this, including the Puget Sound Regional Council and Boston Region MPO.

Denver Regional Council of Governments (DRCOG) “Mile High Connects” initiative: The initiative is a broad partnership of organizations from the private, public and non-profit sectors that are committed to increasing access to housing choices, good jobs, quality schools and essential services via public transit. The DRCOG even created videos featuring developers and local business voices talking about the links among job growth, regional competitiveness and
TOD. Some MPOs have begun to look at housing and transportation costs together to paint a more complete picture of regional affordability and how transportation investments and land-use strategies together improve opportunities across a region. MPOs can incorporate analyses of combined housing and transportation costs into their public information and engagement as well as their planning process and can work with member jurisdictions to incorporate the findings into local planning as well.

CNT H+T (Housing and Transportation) Affordability Index data: The Nashville Area Metropolitan Planning Organization is using the CNT H+T Affordability Index data to identify affordability challenges as part of its current process for developing the 2040 Regional Transportation Plan.

Technical Assistance: Many MPOs provide TA to secure housing funds to support local jurisdictions in developing effective housing strategies and programs.

Sustainable Communities Initiative (SCI): Austin’s SCI allowed for elected officials to review housing affordability trends and proactively address issues of gentrification and anticipate community needs. This has included a stronger emphasis on how regional economic and racial disparities are impacted by transportation and housing investment decisions.

Opportunity mapping: In recent years, the Houston-Galveston Area Council (H-GAC) have brought a multitude of resources to bear on addressing regional challenges. This has included a stronger emphasis on how regional economic and racial disparities are impacted by transportation and housing investment decisions. Opportunity mapping has become an important tool in this work. The two primary objectives identified were to diversify the region’s housing stock and reduce and improve high-poverty areas. A key role for the innovative MPO, then, is to bring technical and financial resources in support of local communities, providing relatively low-cost services such as educational outreach and data analysis. Some MPOs are funding new programs and incentives to help local communities with planning, zoning updates and small-scale capital projects. Through this strategy, MPOs create a pipeline of housing projects for future TIPs and RTPs that have community support and are consistent with regional goals.

Educational opportunities: MPOs provide educational opportunities for local jurisdictions across different sectors. Recently, several MPOs have provided training on community place-making. Place-making integrates urban design with community-driven arts and cultural amenities to create neighborhoods and transportation infrastructure that are economically successful, physically attractive, and safe. For transportation agencies like MPOs, place-making can be an effective strategy to use in designing transit stations, transportation corridors or other public spaces. The Southeast Michigan COG (Detroit) offered a 2014 “SEMCOG University” program for local elected officials, including a six-part place-making workshop for non-profit and private sector partners. Through foundation support, SEMCOG held workshops in low income neighborhoods of Detroit. Some topics covered in the workshops included road safety and walkable/bikeable audits to improve key corridors; techniques for managing traffic flow;
strategies for providing a well-rounded housing mix; creating eye-catching commercial areas; and using green infrastructure to preserve and restore water quality and the urban tree canopy.

**Livable Centers Initiative:** Livable Centers Initiative (LCI) is a grant program with a mix of Federal transportation dollars to regional planning agencies that incentivizes local jurisdictions to re-envision their communities as vibrant, walkable places that offer increased mobility options and encourage healthy lifestyles and provide improved access to jobs, services, and housing. One of the most successful LCI programs comes from the Atlanta Regional Council (ARC).

**Fair Housing Planning:** Some regional planning agencies are taking on the role of fair housing planning, including Pioneer Valley Planning Commission (PVPC). Fair housing planning can focus on a number of housing related issues such as public housing, homelessness, housing affordability, design review, or funding.

**Housing production plans:** A Housing Production Plan (HPP) is a community's proactive strategy for planning and developing affordable housing and providing diverse housing opportunities for all households based on a comprehensive assessment of current and future needs. Currently, many regional planning agencies are starting to do this, including Pioneer Valley Planning Commission (PVPC).

**Housing permit database:** In order to fully assess housing development spatial patterns ABAG collects residential building permits issued from jurisdictions throughout the Bay Area. This information, collected annually, includes the location, building type, and affordability levels of the units, enabling users to answer questions like how much housing was permitted within a jurisdiction, on Housing Element Sites or in Priority Development Areas (PDAs) by year and at what affordability levels, which neighborhoods are growing the most and the least, and whether or not housing was permitted on sites identified by the jurisdiction in its housing element.

**Housing policy directory and toolkit:** The Bay Area faces a housing affordability problem dating back decades that is both acute and chronic and whose solutions lie in expanding housing supply -- particularly more affordable housing -- and preserving existing housing. To those ends, ABAG works with local governments, stakeholders from throughout the region, and state and federal policymakers to expand housing choices and increase housing affordability. ABAG facilitates dialogue and information sharing in order to enable coordinated action. This website provides data about housing planning, production, and policies to inform policies and action to produce new homes, preserve affordability, and protect residents against economic displacement.

**Statewide**

California Department of Housing and Community Development (HCD) is analyzing the relationship between jobs and housing, including improved balance between the number of low-wage jobs and the number of housing units affordable to low-wage workers in each jurisdiction.
Additionally, they provide education and awareness of fair housing laws and issues and are currently developing a policy guide for displacement avoidance plan and affordable housing preservation. HCD also has toolboxes that include model ordinances, templates, checklists, and handbooks that help jurisdictions comply with land-use and planning laws such as density bonus, ADUs, supportive housing, reasonable accommodation, and other topics.

What Would Work Best in San Joaquin County?

As MPOs and other regional planning bodies become more involved in housing discussions, it will be important for SJCOG to determine what level of involvement is expected. SJCOG can support the region and local agencies in many ways, including:

- Collaborating across San Joaquin County to implement housing strategies
- Providing current housing data through extensive research
- Promoting housing policy best-practices
- Delivering specific technical tools and assistance
- Pursuing policy changes at the state, regional, and local levels

Based on the best practices research, Figure 12 assesses the areas where it could be beneficial to have a regional role (if there was funding support):
<table>
<thead>
<tr>
<th>Task</th>
<th>Possible Regional Role?</th>
<th>Estimated Cost to Implement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fair Share Program</td>
<td>Maybe</td>
<td>High</td>
</tr>
<tr>
<td>Prioritize centers for regional investment</td>
<td>Yes</td>
<td>Low</td>
</tr>
<tr>
<td>Mile High Initiative</td>
<td>Maybe</td>
<td>Medium</td>
</tr>
<tr>
<td>Affordability Indexes</td>
<td>No</td>
<td>High</td>
</tr>
<tr>
<td>Technical Assistance</td>
<td>Yes</td>
<td>Low/Medium</td>
</tr>
<tr>
<td>Sustainable Communities Initiative (SCI)</td>
<td>Maybe</td>
<td>High</td>
</tr>
<tr>
<td>Opportunity mapping</td>
<td>Yes</td>
<td>Medium</td>
</tr>
<tr>
<td>Educational opportunities</td>
<td>Yes</td>
<td>Low/Medium</td>
</tr>
<tr>
<td>Livable Communities Initiative (LCI)</td>
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<td>High</td>
</tr>
<tr>
<td>Fair Housing planning</td>
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</tr>
<tr>
<td>Housing production plans</td>
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<td>Low</td>
</tr>
<tr>
<td>Housing permit database</td>
<td>Maybe</td>
<td>Medium/High</td>
</tr>
<tr>
<td>Policy directory and toolkit</td>
<td>Maybe</td>
<td>High</td>
</tr>
</tbody>
</table>

*Figure 12: Evaluation Matrix of the Possible Regional Roles (subject to funding)*
VIII. SOURCES


Association of Bay Area Governments, housing. Link: https://abag.ca.gov/our-work/housing


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