ORANGE COUNTY COUNCIL OF GOVERNMENTS

Technical Advisory Committee

Meeting Date / Location

Tuesday, February 7, 2023
9:30 A.M. – 12:00 P.M.

Meeting Link:
https://teams.microsoft.com/l/meetup-join/19%3ameeting_NmY4N2FmNTQtODk4MC00ZGIzLWEyYzItNjU2ODZmMDNiMmI2%40thread.v2/0?context=%7b%22Tid%22%3a%2247feb367-af81-4519-94d7-caab1dfa1872%22%2c%22Oid%22%3a%22a2e04a02-2df2-4f7f-8724-377325b47e13%22%7d

Or call in (audio only)
+1 949-522-6403,,650103999# United States, Irvine
Phone Conference ID: 650 103 999#

Agenda Item	Staff	Page
INTRODUCTIONS	(Chair Equina, City of Irvine)	
PUBLIC COMMENTS	(Chair Equina)	

The agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not include what action will be taken. The Technical Advisory Committee may take any action which it deems appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

At this time members of the public may address the TAC regarding any items within the subject matter jurisdiction, which are not separately listed on this agenda. Members of the public will have an opportunity to speak on agendized items at the time the item is called for discussion. NO action may be taken on items not listed on the agenda unless authorized by law. Comments shall be limited to three minutes per person and an overall time limit of twenty minutes for the Public Comments portion of the agenda.

Any person wishing to address the TAC on any matter, whether or not it appears on this agenda, is requested to complete a "Request to Speak" form available at the door. The completed form is to be submitted to the TAC Chair prior to an individual being heard. Whenever possible, lengthy testimony should be presented to the TAC in writing and only pertinent points presented orally. A speaker's comments shall be limited to three minutes.

ADMINISTRATION

1.	**OCCOG TAC Meeting Minutes** Draft OCCOG TAC minutes for the January 10th, 2023 meeting *Recommended Action:* Approve OCCOG TAC minutes for the January 10th, 2023 meeting as presented or amended	(Chair Equina)	**TAC 4**

Agenda Item		Staff	Page
PRESENTATIONS, DISCUSSION AND ACTION ITEMS, REPORTS			
2.	Center of Demographic and Research (CDR) Update *Recommended Action:* Receive report	(Deborah Diep, Director of CDR) -- 20 minutes	**TAC 9**
3	PATH Program Update *Recommended Action:* Receive report	(Jacob Noonan, SCAG) – 20 minutes	**TAC 12**
4	2022 SoCal Atlas Jurisdictional Reports *Recommended Action:* Receive report	(Mike Gainor, SCAG) – 15 minutes	**TAC 43**
5	SCAG Meeting Update *Recommended Action:* Receive report	(Chair Equina and Deborah Diep) – 10 minutes	**TAC 59**
6	Legislative Update *Recommended Action:* Receive report	**(**Wendy Strack) – 10 minutes	
7	WSP Presentation *Recommended Action:* Receive Report	(Tara Lakes, WSP) – 15 minutes	
8.	REAP Update *Recommended Action:* Receive report	(Executive Director Primmer) – 15 minutes	

REPORT FROM CHAIR/VICE CHAIR

REPORT FROM THE OCCOG EXECUTIVE DIRECTOR

MATTERS FROM OCCOG TAC MEMBERS

ANNOUNCEMENTS FROM NON-MEMBERS

ITEMS FOR NEXT MEETING

IMPORTANT DATES OR UPCOMING EVENTS

February 16 - SCAG Technical Working Group from 10:00 am to 12:00 pm

March 2 – Special Joint Meeting of the SCAG Policy Committees from 9:30 am to 11:30 am
SCAG Regional Council Meeting from 12:00 pm – 2:00 pm

March 23 – OCCOG General Assembly from 9:30 am -1:30 pm

Adjourn to: **MARCH 7, 2023**

AGENDA ITEM # 1 Minutes of January 10, 2023

Draft Action Minutes

The Orange County Council of Governments Technical Advisory Committee (OCCOG TAC) meeting of January 10, 2023, was called to order at 9:31 am by Chair Justin Equina, City of Irvine. The meeting was held through video and telephone conferencing.

PUBLIC COMMENT:

There were no public comments at this time.

ADMINISTRATION

1. **OCCOG TAC Meeting Minutes**

Virginia Gomez, made a motion to approve the OCCOG TAC meeting minutes of December 6, 2022. Ben Zdeba, City of Newport Beach, seconded the motion and the minutes were unanimously approved by the TAC.

PRESENTATIONS, DISCUSSION AND ACTION ITEMS, REPORTS

2. **Center of Demographic and Research (CDR) Update**

CDR Director Deborah Diep provided updates on several efforts:

2022 Housing Inventory System (HIS) Data Collection

It was noted that July-December 2022 HIS activity is due on January 20, 2023, using the form available here: http://www.fullerton.edu/cdr/HISform.xls.

For HIS questions, please contact Paul Lewis, Demographic Analyst, at 657-278-3417 or plewis@fullerton.edu.

Orange County Data Acquisition Partnership (OCDAP)

It was reported that OCDAP Cycle 2's 2022 aerial imagery processing has been completed by the vendor. Invoices for those agencies expressing interest were sent in November. Reminder emails were also sent with instructions on how to sign up via the Cycle 2 Participation Agreement (PA) which can be downloaded at http://www.fullerton.edu/cdr/OCDAP/OCDAP_Documents_Products.aspx. Participants were requested to email the electronically signed PA PDF document to OCCOG Director Marnie Primmer at marnie@occog.com.

SCAG Draft 2024 Connect SoCal Growth Forecast & Supplemental Data Review/Local Data Exchange Program (LDX)

It was reported that the OCP-2022 was approved on September 22, 2022, and submitted to SCAG on behalf of the 35 Orange County jurisdictions as part of the 2024 Connect SoCal development process.

It was also reported that the deadline for jurisdictions to provide SCAG with their data review and verification form regarding the OCP was December 2, 2022. Jurisdictions were encouraged to submit the verification form to SCAG even if the deadline was missed.

For more information, please contact Deborah Diep, Director, Center for Demographic Research at 657-278-4596 or ddiep@fullerton.edu.

OCTA's Master Plan of Arterial Highways (MPAH) & SB 743/Induced Demand

It was reported that the Orange County Transportation Authority (OCTA) is in the process of preparing the Long Range Transportation Plan (LRTP). As part of the process, OCTA is soliciting feedback on the Master Plan of Arterial Highways (MPAH). CDR is assisting and sharing the same segments of the MPAH that were provided for review as part of the OCP-2022 data.

Feedback was requested by January 27, 2023, by contacting Anup Kulkarni of OCTA at akulkarni@octa.net.

3. **SCAG Meeting Update**

Chair Equina provided a brief update from the January 5, 2023, SCAG Regional Council meeting. He reported that SCAG staff provided an update on the Local Data Exchange (LDX) process for Connect SoCal and noted that they are developing a "locally reviewed" version of the forecast that will be presented to the Technical Working Group (TWG) around March 2023. It was noted there will be an extensive public comment period with the final regional forecasted development pattern released in September 2023.

4. **REAP Updates**

Chair Equina noted that there are several speakers who will provide a snapshot of each effort. He introduced Tara Lake of WSP who provided an overview of comprehensive geospatial planning solutions and visualization services. It was reported that the TAC members had until January 13, 2023, to reach out to Marnie for participation in visualization services.

Chair Equina introduced Katie Cawelti of Curt Pringle & Associates who noted they are preparing a "Housing For All" newsletter and mentioned an "ask the expert" housing webinar in December 2022. Katie Cawelti also discussed potential REAP 2.0 ideas including addressing transformative housing, reducing VMTs, efficient infill development, and affirmative furthering fair housing (AFFH).

Chris Adams of Balancing Act demonstrated how its services lower the bar to public participation and is able to structure a conversation where all opinions are invited – characterized as "complaints to problem-solving" to improve the decision-making environment.

Scott Wilkinson of AlphaVu shared how AlphaVu can help collect and analyze data on public sentiment in real-time as a way of providing engagement metrics to track and understand opinions.

Hitta Mosesman of ULI provided an update on the ULI Technical Advisory Panel No. 1's work related to converting commercial to housing. Julia Malisos of ULI introduced the next Technical Advisory Panel preparing for housing in retail/office spaces and potential topics to study. Chair Equina commented that it would be important to understand what is lost when converting commercial centers to residential development.

Molly Mendoza of Placeworks provided an overview of the available affirmatively furthering fair housing support.

The TAC participated in a straw poll to rank potential REAP 2.0 activities with the following being the top five: Housing Element Action Plans Assistance, Fair Housing Outreach Training for Member Agencies, Countywide Fair Housing Educational Sessions/Events, Housing Simulation Software and Implementation (Balancing Act), and Code Updates to Allow Additional Housing.

For feedback or questions on REAP 2.0 efforts, contact Marnie Primmer, OCCOG Executive Director, at 949-698, 2856 or marnie@occog.com.

REPORT FROM CHAIR/VICE CHAIR
The Chair and Vice Chair had nothing to report.

THE EXECUTIVE DIRECTOR
The Executive Direct had nothing to report.

MATTERS FROM OCCOG TAC MEMBERS
There were none.

ANNOUNCEMENTS FROM OCCOG TAC NON-MEMBERS
There were no items to report from non-OCCOG TAC Members.

ITEMS FOR NEXT MEETING
Gail Shiomoto-Lohr requested the OCTA Long Range Transportation Plan be discussed at the February TAC meeting.

IMPORTANT DATES OR UPCOMING EVENTS

- Housing Working Groups, January 17 from 10 a.m. to noon

ADJOURNMENT

The meeting was adjourned at 11:12 a.m. by Chair Equina until February 7, 2023, via video and teleconferencing.

Submitted by:

Benjamin Zdeba, City of Newport Beach
OCCOG TAC Vice Chair

Attendees:

Name	Agency
Alexis Garcia	Yorba Linda
Amanda Lauffer	Anaheim
Amber Dobson	Laguna Beach
Andrew Gonzales	Placentia
Angel Garfio	OCTA
Anthony Viera	Laguna Beach
Belinda Deines	Dana Point
Benjamin Zdeba	Newport Beach
Chris Chung	Garden Grove
Chris Schaefer	Fullerton
Daniel Kesicbasian	Laguna Niguel
Deborah Diep	CDR
Derek Bingham	Rancho Santa Margarita
Eric Roess	Laguna Niguel
Gail Shiomoto-Lohr	Consultant
Jazmine Estores	Consultant
Jay Wuu	Laguna Hills
Joel Rojas	San Juan Capistrano
Joanne Hwang	Brea
Jonathan Hughes	SCAG
Jorge Maldonado	Tustin
Justin Equina	Irvine
Katie Cawelti	Curt Pringle + Associates
Lisa Telles	Consultant
Maribeth Tinio	Stanton
Matt Foulkes	Buena Park
Melissa Chao	Irvine
Michelle Baehner	CDR
Michelle Boehm	Consultant
Paul Lewis	CDR
Phayvanh Nanthavongdouangsy	Costa Mesa
Ricardo Soto	Santa Ana
Rose Rivera	Aliso Viejo
Ron Santos	Lake Forest
Sandie Kim	Westminster
Scott Shelley	Caltrans
Virginia Gomez	TCA
Yuritzy Randle	County of Orange

Orange County Council of Governments

STAFF REPORT
February 7, 2023

AGENDA ITEM # 2 Center for Demographic Research (CDR) Updates

STAFF RECOMMENDATION

Receive reports and discussion.

1. **2022 Housing Inventory System (HIS) Data Collection**

The July-December 2022 HIS data was due on January 20, 2023.

Please submit data to CDR using the HIS form located at http://www.fullerton.edu/cdr/HISform.xls. Revisions to prior years may use either the new or old form. Please verify that the same data reported to CDR is also provided to DOF in their annual Housing Unit Change Survey. For HIS questions, please contact Paul Lewis, CDR's Demographic Analyst at 657-278-3417 or palewis@fullerton.edu.

2. **U.S. Census Bureau 2023 Consolidated Boundary and Annexation Survey (CBAS)**

The U.S. Census Bureau is now conducting the Boundary and Annexation Survey (BAS). BAS is a voluntary survey but participation is important for the following reasons:

1. The Census Bureau uses this boundary information for data collection, tabulation, and dissemination for the decennial census, American Community Survey (ACS), Population Estimates Program (PEP), and many other censuses and surveys.
2. The federal government allocates more than $675 billion in federal funds annually for health, welfare, infrastructure, education, and other federal programs and services. Correct boundaries ensure governments receive funds appropriately and have the best data available for their decision-making processes.

- 33 of 35 jurisdictions delegated boundary review to CDR for CBAS
- Updated boundary annexation information along with boundary cleanup was submitted to the Census Bureau by the March 1, 2023 deadline for all Orange County using the County of Orange Surveyor official boundaries.
- Any official boundary changes effective during calendar year 2022 were reported in January 2023.

3. **Orange County Data Acquisition Partnership (OCDAP)**

Invoices for those agencies expressing interest in OCDAP Cycle 2 were sent in November 2022. Signups may continue through June 2024. Reminder emails have been sent with instructions on how to sign up via the Cycle 2 Participation Agreement (PA) that can be downloaded at http://www.fullerton.edu/cdr/OCDAP/OCDAP_Documents_Products.aspx. Email the electronically-signed PA PDF document to Marnie Primmer at marnie@occog.com.

Payment must be made to the vendor before receipt of imagery, so it is critical that agencies sign up and remit payment to OCCOG. Imagery is expected to be delivered to Active members in February 2023. Active= both signed PA and payment received by OCCOG.

For documents, current member status, and more information, please visit the OCDAP website at http://www.fullerton.edu/cdr/OCDAP/index.aspx.

Note that CDR records provided in this report may be incomplete and additional information may be submitted to ddiep@fullerton.edu to update records.

Agency	Date Agency signed PA	Date OCCOG signature	Cycle 2	Date Paid	Cycle 2 Status
Anaheim	10/26/2022		$6,500		Pending payment
Brea	11/8/2022		$3,000	12/15/2022	Active
Buena Park	11/17/2022	11/17/2022	$3,000	12/19/2022	Active
Costa Mesa			$3,000		
Dana Point			$3,000		
Fountain Valley			$3,000	11/23/2022	Pending PA receipt
Garden Grove		11/4/2022	$3,000	12/15/2022	Active
Laguna Beach			$3,000	12/29/2022	Pending PA receipt
Laguna Hills			$3,000		
Laguna Niguel	11/14/2022	1/5/2023	$3,000	12/15/2022	Active
La Habra			$3,000	12/7/2022	Pending PA receipt
Lake Forest	11/12/2022	12/1/2022	$3,000		Pending payment
Los Alamitos			$3,000	12/15/2022	Pending PA receipt
Mission Viejo			$3,000	12/7/2022	Pending PA receipt
Newport Beach	1/11/2023	2/1/2023	$3,000	12/19/2022	Active
Orange	8/30/2022	8/30/2022	$5,000	10/14/2022	Active
Placentia	12/14/2022	12/15/2022	$3,000		Pending payment
San Clemente	pending		$3,000		
San Juan Capistrano			$3,000	12/7/2022	Pending PA receipt
Santa Ana	11/21/2022	11/30/2022	$6,500	12/7/2022	Active
Seal Beach			$3,000		
Tustin			$3,000	12/19/2022	Pending PA receipt
Yorba Linda			$3,000	12/19/2022	Pending PA receipt
MWDOC	Routing		$53,000	routing	
OCFA	SIGNED		$58,702	En route	
OCCOG	MOU w/ County		$20,000		Active
County of Orange	MOU w/ OCCOG		$50,000		Active

4. SCAG 2024 Connect SoCal Growth Forecast & Supplemental Data Review/Local Data Exchange Program (LDX)

The OCP-2022 was approved on September 22, 2022 and submitted to SCAG on behalf of the 35 Orange County jurisdictions as part of the 2024 Connect SoCal development process. CDR also submitted suggested changes to NMAs and a draft entitlement database to SCAG with the caveat that information provided by jurisdictions would supersede what CDR provided.

The deadline to submit corrections and feedback on the additional data layers within the Data/Map books vis the Supplemental Data Review/Local Data Exchange Program (LDX) was December 2, 2022. **Please submit the data review & verification form to SCAG** even if is past the deadline as submitting the forms will help to document and bolster the explanations and justifications for the data and growth submitted to SCAG by the jurisdiction for the 2024 RTP/SCS.

STAFF CONTACTS

Contact: Ms. Deborah Diep, Director, Center for Demographic Research
657/278-4596 ddiep@fullerton.edu

Employment data: Ms. Ruby Zaman, Assistant Director, CDR
657/278-4709 ruzaman@fullerton.edu

For HIS: Mr. Paul Lewis, Demographic Analyst, CDR
657-278-3417 palewis@fullerton.edu

REAP 2021: Programs to Accelerate Transformative Housing (PATH) Program Funding Application

February 2023

Jacob Noonan, Housing Program Manager, SCAG

WWW.SCAG.CA.GOV

SCAG REAP 2.0 Program Framework - Overview

$246 million = SCAG's region's formula share

Obligated by June 2024

Expended by June 2026

"Transformative Planning and Implementation Activities"

- Accelerating infill development that Facilitates Housing Supply, Choice, and Affordability
- Affirmatively Further Fair Housing
- Reduce Vehicle Miles Travelled

Early Action Initiatives

- Subregional Partnership Program 2.0 (Housing Element Support)
- Sustainable Communities Program (SCP)
- Local Information Services
- Regional Data Platform

Transportation Partnership Program

- County Transportation Commission Partnership Program
- Regional Pilot Initiatives Program

Programs to Accelerate Transformative Housing (PATH)

- NOFA
- HIPP Pilot Program
- RUSH Pilot Program

PATH Program Funding Areas

$88,835,000

NOFA
(*For Lasting Affordability*)

- Funding for Innovative Housing Finance
- Trust Funds, Catalyst Funds
- $45,000,000

RUSH Pilot Program
(*Regional Utilities Supporting Housing*)

- Non-Transportation Utilities Infrastructure Improvements
- $35,000,000

HIPP Pilot Program
(*Housing Infill on Public and Private Land*)

- Scaling Up Development of Available Land
- Large Corridor-Wide or Area-Wide Infill Housing Policies and Initiatives
- $8,835,000

Submittal Check List

- Responses must be signed by authorized representative
- All sections fully completed
- All attachments included

Application

- ❑ Section 1. Signature & Terms
- ❑ Section 2. Minimum Requirements
- ❑ Section 3. General Information
- ❑ Section 4. Evaluation Criteria
- ❑ Section 5. Administrative Provisions

Attachments

- ❑ Outcomes and Metrics
- ❑ Budget and Timeline
- ❑ Scope and Deliverables
- ❑ Project Area Maps

Selection Process

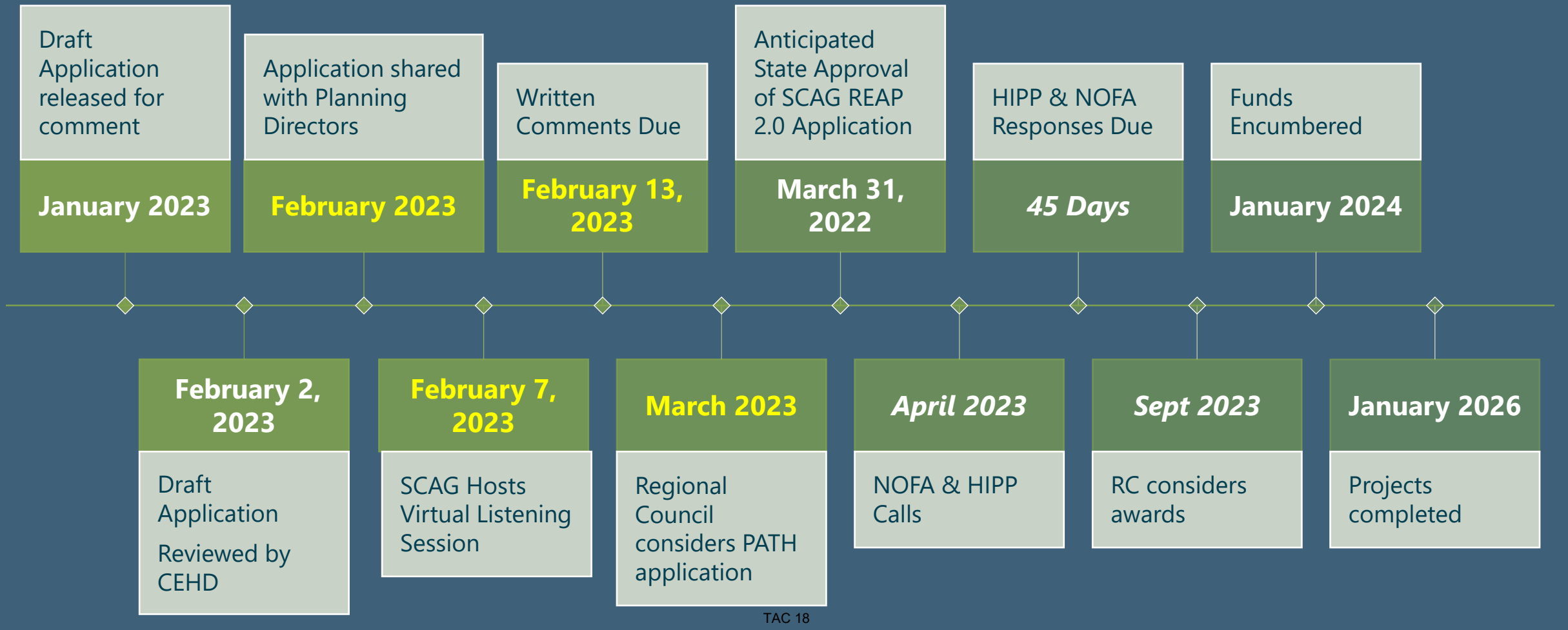
- Selection panel will use five-point scale
- A score less than one for either Criteria 1 or 2 disqualifies an application
- Technical assistance available!

	Evaluation Criteria	Points Possible	% of Total
1	**Lead to a Transformative Significant Beneficial Impact**	**25**	**31.25**
1.1	Accelerate Infill Development that facilitates Housing supply, Choice, and Affordability	15	
1.2	Affirmatively Further Fair Housing (AFFH)	5	
1.3	Reduce Vehicle Miles Travelled	5	
2	**Include Equitable Targeted Outreach**	**10**	**12.5%**
2.1	Priority Populations Engagement	5	
2.2	Inclusive, Diverse & Equitable Engagement	5	
3	**Leverage Partnerships, Policy Match, Building Local Capacity, Ability to Complete the Project, and Cost Effectiveness**	**25**	**31.25**
3.1	Local Policy Commitment	5	
3.2	Partnerships or Financial Match	5	
3.3	Ability to Complete the Project and Cost Effectiveness	15	
4	**Prioritize Disadvantaged Communities**	**10**	**12.5%**
4.1	Priority Populations	5	
4.2	Addressing Historic/Current Inequities & Priority Population Benefit	5	
5	**Contributes to Regional Transformative Change**	**10**	**12.5%**
5.1	Innovative Approaches to Scale Housing Supply	5	
5.2	Advancing Regional Diversity	5	
TAC 16	**Total**	**80**	**100%**

Calls for Applications

Each Call Opened Separately	April 2023 (*Anticipated*)
Responses Due	45 days
Completeness review	Late May - Early June
Final Scores Determined	Mid-Summer
Conditional Awards Issued	60 days of response due date
Regional Council Considers Funding Awards	September

Program Milestones



REAP 2.0 Technical Assistance

Materials will be posted on the *scag.ca.gov/reap2021* at the release of the Call for Projects.

PATH Technical Assistance Available

- ❑ **Application Workshops (Early April)**
- ❑ **Weekly Office Hours**

Registration open once calls released

Visit SCAG's REAP 2021 webpage to schedule an appointment. (www.scag.ca.gov/reap2021)

Draft Funding Application

Submit written comments by:
February 13 at 5:00pm

- Access the draft application at: www.scag.ca.gov/reap2021
- Email comments to: Jacob Noonan at noonan@scag.ca.gov

REAP 2.0 Updates- SCP Call 4 Call for Applications

Sustainable Communities Program – Civic Engagement, Equity & Environmental Justice

- $5 million Competitive
- Cities & Counties are eligible
- Sample eligible uses include Housing & Land Use Strategies & Multimodal Communities
- Call for Applications will be released Spring 2023

THANK YOU

For more information, visit:

https://scag.ca.gov/reap2021

Jacob Noonan, Housing Program Manager
Email: noonan@scag.ca.gov

[TEMPLATE] PROGRAM APPLICATION

[Add short description for the specific funding area the application is for: NOFA, HIPP, or RUSH].

Issued: [TBD]

Submit completed applications along with all required attachments to: housing@scag.ca.gov

Responses due by 5:00 p.m. on [MONTH, DAY], 2023

Applications can be submitted at any time during the application period. SCAG will consider all applications submitted during the application period received at the closing time and day.

More information at: www.scag.ca.gov/reap2021

Submit questions or request additional information by email with "PATH Application" in the subject line to: housing@scag.ca.gov

Southern California Association of Governments
900 Wilshire Blvd., Ste. 1700
Los Angeles, CA 90017
to: housing@scag.ca.gov

Southern California Association of Governments
900 Wilshire Blvd., Ste. 1700
Los Angeles, CA 90017

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Introduction

[*A short description for the specific funding area in the PATH Program the application will be used for will be included. The PATH Program funding areas include: the NOFA For Last Affordability, the Housing Infill on Public and Private lands (HIPP) Pilot Program, and the Regional Utilities Supporting Housing (RUSH) Pilot Program. Information on the PATH Program and the three funding areas is in the PATH Program Guidelines, which are available online at*: www.scag.ca.gov/reap2021] [State REAP 2.0 Program Guidelines are available at: https://www.hcd.ca.gov/docs/grants-and-funding/MPO-REAP-2-0-Final-Guidelines.pdf]

Office Hours

SCAG staff is available to respond to questions and discuss proposed projects. Staff will begin holding weekly office hours in February 2023. An applicant does not need to have a project fully developed to participate in one-on-one consultations. Efforts will be made to accommodate meeting requests. There is no limit to the number of meetings possible. Interested applicants can visit SCAG's REAP 2021 webpage at: www.scag.ca.gov/reap2021 to schedule an appointment.

Please email questions to housing@scag.ca.gov with the subject line "PATH Application." Inquiries made by any other means will not be answered. Effort will be made to respond within two (2) business days. During each call for applications, staff will post all questions received along with responses. This will be done in batches on the REAP 2021 webpage.

Feedback on an application or a proposed project shared by SCAG staff should not be considered an indication the proposed application or project will be awarded funding.

Selection Process

Each of the three funding areas in the PATH Program will begin with a call for applications. The application will be made available when the call is announced. The call will specify the period of time during which applications will be accepted. While each call is open, an applicant may amend a response that has been submitted up to the response due date and time (close of the call). Once the call is closed, not further amendments are allowed. Applicants are encouraged to take advantage of SCAG's technical assistance that is available. More information is provided below and at www.scag.ca.gov/reap2021.

SCAG staff will review all responses received during an open call in two (2) stages: 1) Completeness (see the application submittal checklist) and 2) Technical Scoring and Evaluation.

The Completeness review evaluates completeness of the application and compliance with the submittal requirements. If all requirements are not met, SCAG staff will notify the applicant that the application is incomplete and will not be considered. Submitted application materials will not be returned. Results of the Completeness review are final and may not be appealed. SCAG may, in its sole discretion, request clarification of any portion of an application from the applicant and its applicant team.

Applications that pass Completeness review move to Technical Scoring and Evaluation, which evaluates projects based on the Project Application Scoring Criteria. All complete applications will be evaluated by a selection panel consisting of subject matter experts using the scoring rubric and evaluation criteria provided in Section 3 and Section 4 of the application. The selection panel may request additional information from applicants related to the scoring criteria. The selection panelists' scores for each application will be compiled to produce the final score. The selection panel will then meet to determine the final ranking of applications. Applicants will be notified of their score and ranking and provided an opportunity to appeal. Selected applications will be issued a conditional award letter and recommended for funding to the Regional Council. All conditional awards are provisional until approved by the Regional Council.

Selection Process Timelines

The call for applications for each specific funding area will be announced in early 2023, following the state approval of the PATH program and the SCAG Regional Council authorization to release the call. State approval is anticipated by March 31, 2023, while the Regional Council is scheduled to consider approving the calls at its March meeting. Based on these dates, the following timelines have been developed for each funding area, subject to change.

NOFA

Call Issued	April 2023 (Anticipated)
Responses Due	45 days
Completeness Review	Late May – Early June
Final Scores Determined	Mid-Summer
Conditional Awards Issued	60 days of response due date
Regional Council considers Funding Awards	September

HIPP Pilot Program

Call Issued	April 2023 (Anticipated)
Responses Due	45 days
Completeness Review	Late May – Early June
Final Scores Determined	Mid-Summer
Conditional Awards Issued	60 days of response due date
Regional Council considers Funding Awards	September

RUSH Pilot Program

Call Issued	Late Spring (following the utility industry forum)
Responses Due	45 days
Completeness Review	Early Summer
Final scores determined	Mid- Summer
Conditional Awards Issued	60 days of response due date
Regional Council considers Funding Awards	September

…

DRAFT

Application

To be considered for the [*insert specific funding area in PATH*] Program, the applicant must be eligible and file a completed application with all required attachments before the close of the call for applications.

Submittal Checklist

Please check each box in the lists below as each is completed.

The application includes the following sections, which must be filled out completely:

- ❑ Section 1. Application Terms and Signature
- ❑ Section 2. Minimum Requirements
- ❑ Section 3. Contact Information and Project Description
- ❑ Section 4. Evaluation Criteria
- ❑ Section 5. Administrative Provisions

The following attachments must accompany the completed application (templates are provided):

- ❑ Outcomes and Metrics
- ❑ Budget and Timeline (that meets the encumbrance and expenditure deadlines)
- ❑ Scope and Deliverables
- ❑ Project Area Maps (one map identifying Disadvantaged Communities and another map establishing all work will be completed in infill areas per the definition)
- ❑ Letter of Support (from a third-party organization that the project meets local housing needs)

Submittal Instructions

Submit the completed application and all required attachments to: housing@scag.ca.gov

The email subject line should be labeled in the following format: "PATH Application_Applicant Name_Project Name". The applicant should attach the following to the email as individual, completed files: 1) Application (Signed, PDF), 2) Budget – Timeline – Scope – Deliverable – Measurable Outcomes (Excel Workbook), 3) Project Maps (PDF), 5) Letter of Support (PDF), and 6) Disclosures (Signed, PDF).

Responses are due by 5:00 p.m. on [MONTH, DAY], 2023

Applications can be submitted at any time while the call is open. SCAG will consider all responses submitted during the open call as received at the closing time and day.

Technical Assistance Available

While each call is open, an applicant may amend a response that has been submitted up to the response due date and time (close of the call). Once the call is closed, not further amendments are allowed.

Applicants are encouraged to take advantage of SCAG's technical assistance during the open call, which includes information posted on the REAP 2021 webpage, assistance with questions during weekly office hours, and the option to schedule a one-on-one meeting to discuss the application, proposed project(s), and submittal requirements.

For information about technical assistance available, visit www.scag.ca.gov/reap2021.

Section 1. Application Terms and Signature

A person duly authorized to sign for the organization (city manager, general manager, executive director, planning director or equivalent) must sign and certify the application. If this application is selected for funding, the information contained in this application will become the foundation of a funding agreement with SCAG. Applicants should be aware that SCAG may place stipulations on the project as a condition of the approval. These will be noted at the time of the funding recommendation. SCAG can also withdraw funding if the agency does not comply with the terms of the funding agreement.

Funding available under this Program Application is dependent upon SCAG's receipt of Regional Early Action Planning Grant (REAP 2.0) funds from the State of California. In the event funds offered through this Program Application are not available, SCAG, at its sole discretion, may terminate its obligations resulting from this Program Application.

SCAG reserves the right, in its sole discretion, to reject any and all applications in whole or in part.

Acceptance by SCAG of an application under this Program Application constitutes agreement by the applicant as to all terms, conditions, requirements, and rules of the application but does not constitute a contract or commitment of any kind.

- ❑ I confirm that I have reviewed the Submittal Checklist and that all application sections and required attachments have been filled out completely and will be submitted together following the Submittal Instructions.

- ❑ To the best of my knowledge, all information contained in this application is true and correct. If awarded funding from SCAG, I agree that I will adhere to the program guidelines, as well as provide a local resolution evidencing authorization to execute a funding agreement and receive funds.

_____
Signature

_____
Date

_____
Print Name

_____
Title

_____
Organization Name

Issued _____

DRAFT

Section 2: Minimum Requirements

The following requirements establish eligibility to apply.

Section 1.1: Eligibility

The applicant must meet the following criteria:

[*Application will include the eligibility requirements for the specific funding area: NOFA, HIPP, RUSH. Refer to the PATH Program guidelines, Sections 2.2, 2.3, and 2.4 for the eligibility criteria specific for each funding area*]

Section 1.2: Project Meets Infill Definition

Eligible projects must be entirely located in infill areas per the definition.

Is your project located in an infill area, as defined in Section 3.2 of the PATH Program Guidelines? [Insert link to definition].

☐ Yes
☐ No

If Yes, please describe how the project location meets the definition of infill. Priority Growth Areas (PGAs) (apart from Spheres of Influence) can be used as reference to identify eligible areas, but the totality of the project area must still meet the infill definition. (PGAs are discussed in Chapter 3 of the Connect SoCal 2020 Plan) [1,000-word limit]

Once you have done this, please follow the instructions [instructions for creating and saving an area map will be provided] to create and download a map of your project area that identifies how all activities will meet the definition of infill. This map must accompany your submitted application.

If your project area does not meet the definition of infill, do not proceed. Your project is not eligible.

Section 3: Contact Information and Project Description

Section 3.1: Applicant Information

Agency or Organization Name: _____

Jurisdiction (if applicable): _____

Description of Agency/Organization or Mission Statement: _____

Address: _____

Application Contact: _____ Title: _____

Email: _____ Phone: _____

Number of Applications Submitted: _____

If multiple applications for funding are submitted by your organization, please discuss below your prioritization for the applications. If no other applications are submitted, mark "N/A". [1,000-word limit]

Section 3.2: Project Name and Location

Project Name: _____

Project Location**: _____

**For projects applying to Scaling Up Development of Available Land, please provide addresses and APNs. For projects applying to Corridor-Wide or Area-Wide Infill Housing Policies and Initiatives, please provide project area boundaries.

Subregion or COG: _____ County: _____

Estimated Project Costs: _____

Requested Amount: _____

Local Match/Other Sources (Not Required): _____

Issued _____

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Section 3.3: Project Description

[Applicants will be prompted to include a description of the proposed project fitting within the specific funding area eligible uses] [1,000-word limit]

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Section 4: Evaluation Criteria (Scored)

All applications that meet the minimum requirements in Section 2 will be scored on how the project meets: (1) the REAP 2.0 Program Objectives and SCAG Key Priorities, and (2) provides Transformative and Significant Beneficial impacts in relation to the following criteria. The maximum number of points possible for each criterion is provided in the chart below. More detail on each of the criteria is provided below as well as in Section 3.2 of the PATH Program Guidelines.

Evaluation Criteria		Points Possible	Percent of Total
1	Lead to a Transformative Significant Beneficial Impact	25	31.25%
1.1	Accelerate Infill Development that facilitates: - Housing supply, - Choice, and - Affordability	15	18.75%
1.2	Affirmatively Further Fair Housing (AFFH)	5	6.25%
1.3	Reduce Vehicle Miles Travelled	5	6.25%
2	Include Equitable Targeted Outreach	10	12.50%
2.1	Priority Populations Engagement	5	6.25%
2.2	Inclusive, Diverse & Equitable Engagement	5	6.25%
3	Leverage Partnerships, Policy Match, Building Local Capacity, Ability to Complete the Project, and Cost Effectiveness	25	31.25%
3.1	Local Policy Commitment	5	6.25%
3.2	Partnerships or Financial Match	5	6.25%
3.3	Ability to Complete the Project and Cost Effectiveness – Experience completing similar projects – Plan for ensuring project is completed on time and budget – Approach for ensuring cost effective use of funding	15	18.75%
4	Prioritize Disadvantaged Communities	10	12.50%
4.1	Priority Populations	5	6.25%
4.2	Addressing Historic/Current Inequities & Priority Population Benefit	5	6.25%
5	Contributes to Regional Transformative Change	10	12.50%
5.1	Innovative Approaches to Scale Housing Supply	5	6.25%
5.2	Advancing Regional Diversity	5	6.25%
	Total	80	100%

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4.1. Lead to a Transformative Significant Beneficial Impact (25 Points)

The following set of questions will ask you to describe how the project is a *Transformative Planning and Implementation Activity* (See definition [link to definition]) providing a *Significant Beneficial Impact* that leads to a substantial change in land use patterns, equity, and travel behaviors. Your response must attain a point score for this criterion to be considered for funding. A score of less than one (1) disqualifies the application.

Transformative Planning and Implementation Activities means:

Housing, planning, infrastructure investments supporting Infill development that facilitates Housing supply, choice and affordability, and other actions that enable meeting Housing goals that also result in Per Capita vehicle miles traveled reductions, including accelerating Infill development, supporting residents through realizing Multimodal Communities, shifting travel behavior through reducing driving, and increasing transit ridership.

Transformative Planning and Implementation Activities are meant to address these goals together and to lead to changes in land use patterns and behaviors. Transformative Planning and Implementation Activities shall be in furtherance of all of the following:

a. *State Planning Priorities, as described in Section 65041.1 of the Government Code.*
b. *Affirmatively Furthering Fair Housing pursuant to Section 8899.50 of the Government Code.*
c. *Facilitating Housing Element compliance for the sixth cycle Regional Housing Needs Assessment pursuant to Section 65302 of the Government Code prepared in accordance with Article 10.6 (commencing with Section 65580) of Chapter 3 of Division 1 of Title 7 of the Government Code.*
d. *A region's Sustainable Community Strategy, as described in paragraph (2) of subdivision (b) of Section 65080 of the Government Code, or Alternative Planning Strategy, as described in paragraph (2) of subdivision (b) of Section 65080 of the Government Code, as applicable.*

Significant Beneficial Impact means:

Demonstrating the potential to meet the REAP 2.0, Connect SoCal, and PATH program objectives by establishing and supporting the infrastructure for accelerating housing supply, choice, and affordability, affirmatively furthering fair housing, and reducing VMT by transforming current corridor-wide or area-wide housing policies, site planning, financial models, predevelopment and development processes, and homeownership patterns in a significant and quantifiable manner. Significant beneficial impacts must lead to substantial changes in land use patterns and travel behaviors.

In demonstrating significant beneficial impacts, applicants may consider rates of change (e.g., percent increase over a baseline), the magnitude of impact relative to variables or targets, the proportion of need achieved, and the impact relative to past trends, policies, and practices. Variables or targets may include but are not limited to benefitting households by income group; Regional Housing Needs Assessment; housing units (new construction, preservation/conservation, and rehabilitation); density; infrastructure; infrastructure capacity and accessibility; public space; community amenities; investments; Vehicle Miles

Traveled reduction goals or targets; regional or local equity policies and programs included in an adopted RTP/SCS; and GHG reduction goals or targets.

4.1.1 Accelerate Infill Development that Facilitates Housing Supply, Choice, and Affordability (15 points)

A. In your response describe how the project accelerates infill development that facilitates housing supply (5 Points). Describe how the project will increase the capacity to achieve housing units. This can be described as, but is not limited to, increased unit capacity in existing and newly zoned residential/mixed-use areas, permitting process improvements and standardizations, and other means of increasing the ability to deliver new housing. In your response, address how the project supports achieving the RHNA. [1,000-word limit]

B. In your response describe how the project accelerates infill development that facilitates housing choice (5 Points). Describe how the project will expand the types of housing possible. This can include, but is not limited to, increasing the ability to achieve housing types not common but for which there is an identified need in the community. Some examples of housing types include 2-4 unit properties, townhomes, limited-equity and shared equity co-operatives, and mid- and large scale apartments and condominium projects. In your response, address how the project supports achieving the jurisdiction's 6th cycle RHNA allocation. [1,000-word limit]

C. In your response describe how the project accelerates infill development that facilitates housing affordability (5 Points). Describe how the project will increase the range of rental and sales price points for housing with an emphasis on assuring lasting affordability for housing at extremely low, very low, low, and moderate ranges. In your response, address how the project supports achieving the jurisdiction's 6th cycle RHNA allocation. [1,000-word limit]

4.1.2 Affirmatively Further Fair Housing (AFFH) (5 points)

In your response describe how the proposed project combats discrimination, overcomes patterns of segregation, and fosters equitable and inclusive communities. Please include meaningful actions that address significant disparities in housing needs and in access to opportunity, replacing segregated living patterns with integrated and balanced living patterns, and transforming racially and ethnically concentrated areas of poverty into areas of opportunity. [1,000-word limit]

4.1.3 Reduce Vehicle Miles Travelled (5 points)

In your response describe how the proposed project promotes development that reduces vehicle miles travelled and aligns housing production in infill locations consistent with the state's climate targets and goals discussed in the California AB32 Climate Change Scoping Plan (https://ww2.arb.ca.gov/our-work/programs/ab-32-climate-change-scoping-plan) [1,000-word limit]

Points	Measure
5	**Exceptional** - directly addresses the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives. Transformative and Significant Beneficial impacts are high.
4	**Strong -** directly addresses the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives. Transformative and Significant Beneficial impacts are moderate.
3	**Suitable –** directly addresses the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives. Transformative and Significant Beneficial impacts are uncertain.
2	**Limited –** indirectly addresses the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives. Transformative and Significant Beneficial impacts are low.
1	**Weak** – indirectly addresses the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives. Transformative and Significant Beneficial impacts are uncertain.
0	**Disqualified** – does not meet the REAP 2.0 Program Objectives and SCAG Program Framework Core Objectives, and transformative and Significant Beneficial impacts are negligible.

4.2. Equitable Targeted Outreach (10 Points)

The response must attain a point score for this criterion to be considered for funding. A score of less than one (1) disqualifies the application.

4.2.1 Engagement with Disadvantaged and Historically Underserved Communities (5 points)

Describe the Disadvantaged and Historically Underserved Communities within the project area and outside of the project area that will be served by the project. [1,000-word limit]

4.2.2 Inclusive, Diverse, and Equitable Engagement (5 points)

Describe the project's approach to developing equitable community engagement strategies, what the proposed strategies include, and how community organizations and/or community leaders will be engaged early in the project to inform the proposed engagement strategies. In your response describe how members of disadvantaged and historically underserved communities have been or will be engaged throughout the proposed project and how their input will shape the project. [1,000-word limit]

Points	Metric
5	**Exceptional –** includes an explicit description of how stakeholders will be involved, and specifically from affected/benefitting Disadvantaged Communities and Historically Underserved Communities.
4	**Strong** - includes a description of how applicant will involve stakeholders, and specifically from affected/benefitting Disadvantaged Communities and Historically Underserved Communities.
3	**Suitable –** loosely describes how stakeholders will be involved, including from affected/benefitting Disadvantaged Communities and Historically Underserved Communities.
2	**Limited** – how stakeholders will be involved is generally described with general details on how affected/benefitting Disadvantaged Communities and Historically Underserved Communities.
1	**Weak –** engagement is minimal but includes outreach to affected/benefitting Disadvantaged Communities and Historically Underserved Communities.
0	**Disqualified –** does not include equitable targeted outreach.

4.3. Leverage Partnerships, Policy Match, Building Local Capacity, Ability to Complete the Project, and Cost Effectiveness (25 Points)

4.3.1 Local Policy Commitment (5 points)

Describe how the local policy environment facilitates or supports the funding uses proposed and will accelerate infill development that facilitates housing supply, choice, and affordability, affirmatively furthering fair housing, and reducing VMT. [1,000-word limit]

4.3.2 Partnerships or Financial Match (5 points)

Please describe, as applicable, other sources of funding and partnerships invested in the project. For other funding, please include the funding sources and terms. For partnerships, please describe the nature of the partnerships and long-term commitments from the various organizations. In your response, please describe how the project could leverage or act as a catalyst for additional investment. [1,000-word limit]

4.3.3. Ability to Complete the Project and Cost Effectiveness (15 Points)

Describe how your organization will ensure the project is successfully completed by January 30, 2026, and how cost-effective means will be incorporated.

A. *Experience completing similar projects*. Describe your organization's experience completing similar projects. If the proposed project will be completed by an applicant team, describe the experience for each organization on the team. (5 Points) [1,000-word limit]

B. *Plan for ensuring project is completed on time and budget*. Please outline your organization's plan to ensure the project is completed on time and on budget. In your response, please discuss how your organization or applicant team will address timing delays or cost overruns. (5 Points) [1,000-word limit]

C. Cost Effectiveness. Please describe the approach for ensuring cost effective uses of the funding requested. Please refer to the scope and budget when discussing how the proposal best utilizes the funding to achieve desired outcomes. Your response should correspond to the information provided in the budget & timeline, scope and deliverables, and outcomes and metrics. (5 Points) [1,000-word limit]

Points	Metric
5	**Exceptional** - Clearly demonstrates extensive local policy, community support, and/or financial investments. Applicant has extensive experience and approach for ensuring the project will be completed successfully. Clearly demonstrates ability to complete the project in the REAP 2.0 timeframe and for funding requested.
4	**Strong -** Clearly demonstrates an amount of policy, partnerships, and/or financial investments. Applicant has experience and approach for ensuring the proposed project is completed successfully demonstrating ability to complete the project in the REAP 2.0 timeframe and for funding requested.
3	**Suitable -** Demonstrates a commitment to policy, partnership, or financial support. Applicant has experience and reasonably demonstrates ability to complete the project in the REAP 2.0 timeframe and for funding requested.
2	**Limited** - Demonstrates a commitment to policy, partnership, or financial support. Demonstrates ability to complete the project in the REAP 2.0 timeframe and for funding requested.
1	**Weak** – Includes possible partnerships, supporting policies, and options for building local capacity. Uncertain about ability to complete the project in the REAP 2.0 timeframe and for funding requested.
0	**No evidence** – lacks partnerships, policy match, or local capacity. Uncertain about ability to complete the project in the REAP 2.0 timeframe and for funding requested.

4.4. Prioritize Disadvantaged Communities (10 Points)

4.4.1 Disadvantaged and Historically Underserved Communities (5 points)

Identify targeted disadvantaged and historically underserved communities the project will serve. These communities should correspond to the map provided as an attachment to this application (See Section 1.1. Checklist) [include link to instructions for completing and saving a map for the project].

Please reference Section 3.2.4 of the PATH Guidelines to view definitions for these communities as identified by the REAP 2.0 Guidelines. List all Census Tract data below:

- ☐ SB535 Disadvantaged Communities (CalEnviroScreen 4.0): _____
- ☐ SCAG Communities of Concern: _____
- ☐ TCAC/HCD Opportunity Areas (High segregation and poverty, low resource, and moderate resource communities): _____
- ☐ AB 1550 Communities: _____

4.4.2 Addressing Historic/Current Inequities & Disadvantaged Community Benefits (5 points)

Describe the proposed project and how it benefits Disadvantaged Communities, and how it addresses and intends to repair historic and/or current inequities related to housing security, including housing affordability and reducing displacement and/or expanding access to higher resourced communities. [1,000-word limit]

Points	Metric
5	**Exceptional** – will produce tangible benefits for disadvantaged communities, repair historic and/or current inequities related to housing affordability and reduce displacement.
4	**Strong** – will support disadvantaged communities, improve housing affordability, and reduce displacement.
3	**Suitable** - will loosely support disadvantaged communities, improve housing affordability, and reduce displacement.
2	**Limited** – includes some support for disadvantaged communities, minimal improvement in housing affordability or reducing displacement.
1	**Weak** – indirectly supports disadvantaged communities and does not improve housing affordability or reduce displacement.
0	**No evidence** - the project does not support disadvantaged communities or has potential to negatively affect housing affordability or increase displacement without providing acceptable mitigation.

4.5. Contributes to Regional Transformative Change (10 Points)

In your responses below, describe how the project achieves regional goals with an emphasis on innovations advancing and expanding the conditions necessary to scale housing supply, choice, and affordability to meet the 6th Cycle RHNA, implement SCAG's 2020 adopted Connect SoCal, and meet community needs for housing across the Southern California region. Proposals within similar built environments will be evaluated against one another to ensure projects selected reflect the geographic diversity of the SCAG region.

4.5.1 Innovative Approaches to Scale Housing Supply (5 Points)

Describe how the project incorporates innovative approaches to advance and expand the conditions necessary to scale housing supply, choice, and affordability locally, and in relation to the Southern California region. [1,000-word limit]

4.5.2 Advancing the Connect SoCal Sustainable Communities Strategy (SCS) (5 Points)

Describe how the project implements the Sustainable Community Strategy (SCS) of the Connect SoCal plan (https://scag.ca.gov/read-plan-adopted-final-connect-socal-2020, beginning on Page 48) to facilitate infill development accelerating housing supply, choice, and affordability. In your response describe how the project incorporates SCS, and related, strategies and tools. Also, please describe how the project can be applied in similarly built contexts. [1,000-word limit]

Points	Metric
5	**Exceptional** – Implements the SCS, uses innovative approaches, can be applied in similarly built contexts.
4	**Strong** – Implements the SCS, uses innovative approaches, might be possible to apply in similarly built contexts.
3	**Suitable** – Implements the SCS, approaches are somewhat innovative, might be possible to apply in similarly built contexts.
2	**Limited** – Implements the SCS, approaches are somewhat innovative, most likely not possible to apply in similarly built contexts.
1	**Weak** – Implements the SCS, approaches are not innovative, most likely not possible to apply in similarly built contexts.
0	**No Evidence** – does not implement the SCS or incorporate innovative approaches, most likely not possible to apply in similarly built contexts.

Section 5: Administrative Provisions

SCAG's Rights and Responsibilities

SCAG reserves the right to change the requirements and policies described in this Program Application at SCAG's sole discretion. SCAG is responsible only for what is expressly stated in the Program Application, any authorized written addenda, and any posted Questions and Answers. Such addenda shall be made available to each person or organization via SCAG's REAP 2021 webpage (www.scag.ca.gov/reap2021). It is the responsibility of applicants to ensure, prior to submission, that their application reflects the most recent addenda information, program requirements, and policies. By submission of an application, each applicant acknowledges receipt of all addenda, if any, that are emailed or posted on the SCAG REAP 2021 website. SCAG is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf if those representations conflict with Program Application requirements.

SCAG'S Discretion

SCAG reserves the right, in its sole discretion, to disqualify any application that is incomplete, out of order, lacks required attachments, or contains other content errors, inconsistencies, misrepresented information, or other deficiencies. Forms provided in the Program Application must be used and information provided otherwise may be disregarded at SCAG's discretion. SCAG reserves the right to waive disparities in a proposal if the sum and substance of the application is present. Furthermore, SCAG reserves the right to terminate this program at any time without prior notice.

Cost of Application Preparation

The cost of application preparation shall be borne by the applicant. In no event shall SCAG be liable for any expenses incurred in the preparation and submission of the application.

Application is Property of SCAG

Once submitted, each application becomes the property SCAG and becomes a public record. SCAG is not liable for the public disclosure of any information contained in an application.

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Orange County Council of Governments Technical Advisory Committee

SCAG SoCal Atlas Reports

Mike Gainor, Senior Regional Planner, SCAG

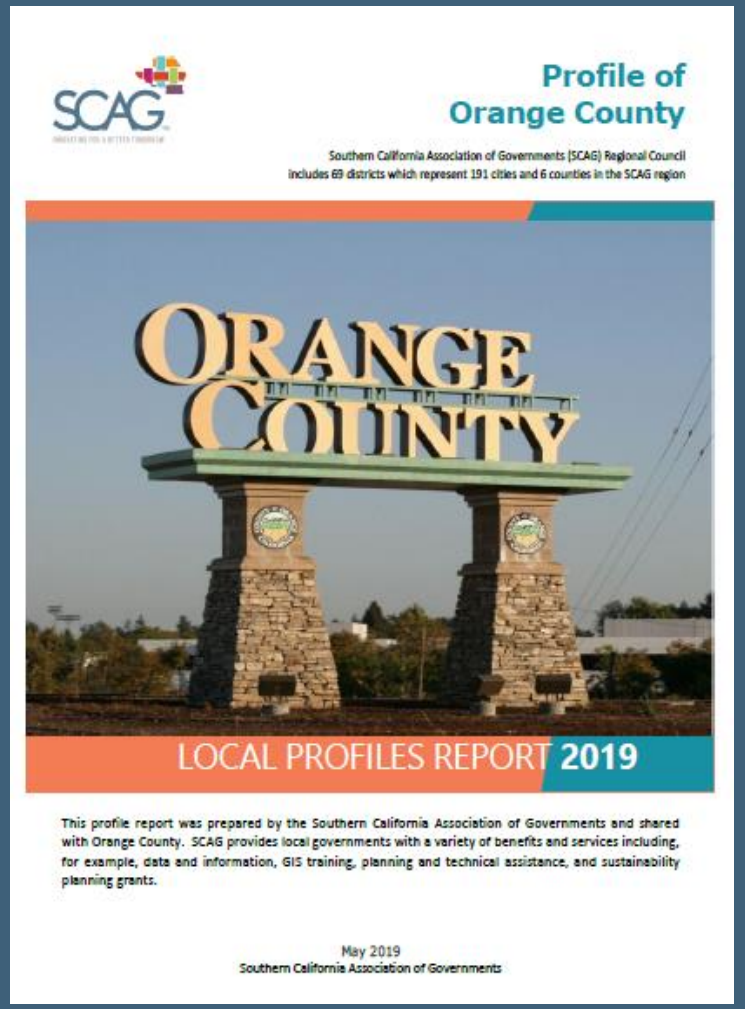
February 7, 2023

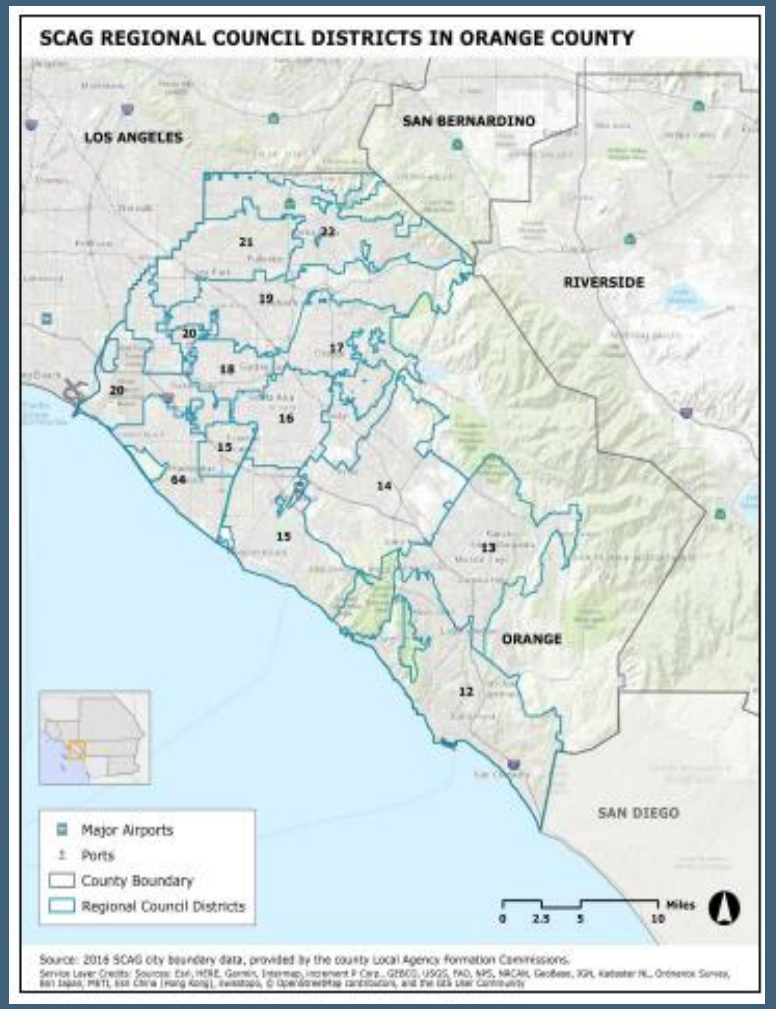
WWW.SCAG.CA.GOV

SCAG Local Profiles

- **Starting in 2009, SCAG began publishing the Local Profiles reports every 2 years.**
- **The Local Profiles provide a wide range of demographic, transportation, housing, & economic data specific to each local jurisdiction in the region**
- **The Local Profiles were last published in 2019, as development of the 2021 reports was postponed.**
- **SCAG is seeking to resume production of the reports through a regional performance monitoring dashbaird application.**

SCAG Local Profiles





https://www.scag.ca.gov/DataAndTools/Pages/LocalProfiles.aspx

SoCal Atlas Overview

- **SoCal Atlas is a web-based tool that allows users to view & analyze data by user specified spatial & topical parameters.**
- **Data is leveraged from multiple sources & generated through the SCAG Regional Hub.**
- **SoCal Atlas consists of 3 primary analytical components: dynamic maps, infographics, & data.**
- **Users may select any local jurisdiction in the SCAG region to review data.**

SoCal Atlas Overview

SoCal Atlas Key Indicators:

- Population
- Average Household Size
- Educational Attainment
- Median Household Income
- Median Home Value

SoCal Atlas Housing Data:

- Number of Housing Units
- Owner/Renter Share
- RHNA Allocation

SoCal Atlas Overview

SoCal Atlas Employment Data:

- Share of Working Age Population
- Unemployment Rate
- Share of Commuters Driving Alone
- Share of White Collar/Blue Collar/Service Workers

SoCal Atlas Vulnerability Indicators:

- Population by Age
- Poverty Status
- Health Insurance Coverage
- Population Share by Ethnicity

SoCal Atlas Overview

- **The primary differences between SoCal Atlas & Local Profiles are the inclusion of additional datasets, online interaction capability, & data granularity.**
- **SoCal Atlas illustrates key indicators by topic & geography (county, city, tract) & features nearly 40 data variables & 18 maps organized in 4 categories:**

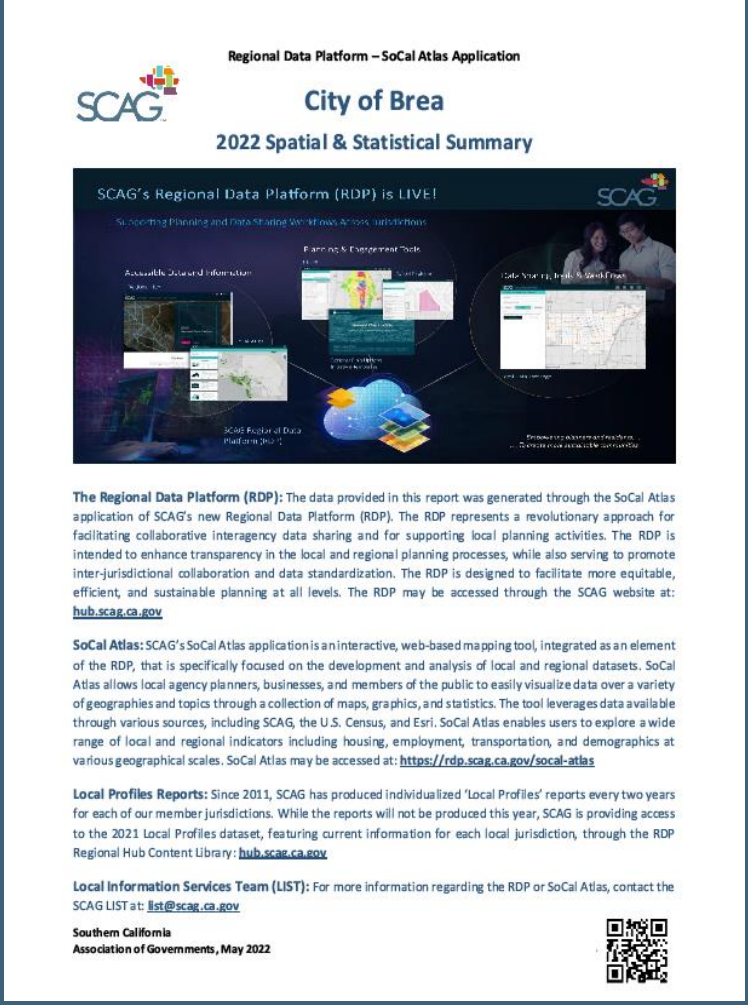
  Key Indicators: (10) data variables & (4) maps

  Housing: (10) data variables & (5) maps

  Employment: (11) data variables & (5) maps

  Community Vulnerability: (8) data variables & (4) maps

SoCal Atlas Reports



Regional Data Platform – SoCal Atlas Application

SCAG

City of Brea

2022 Spatial & Statistical Summary

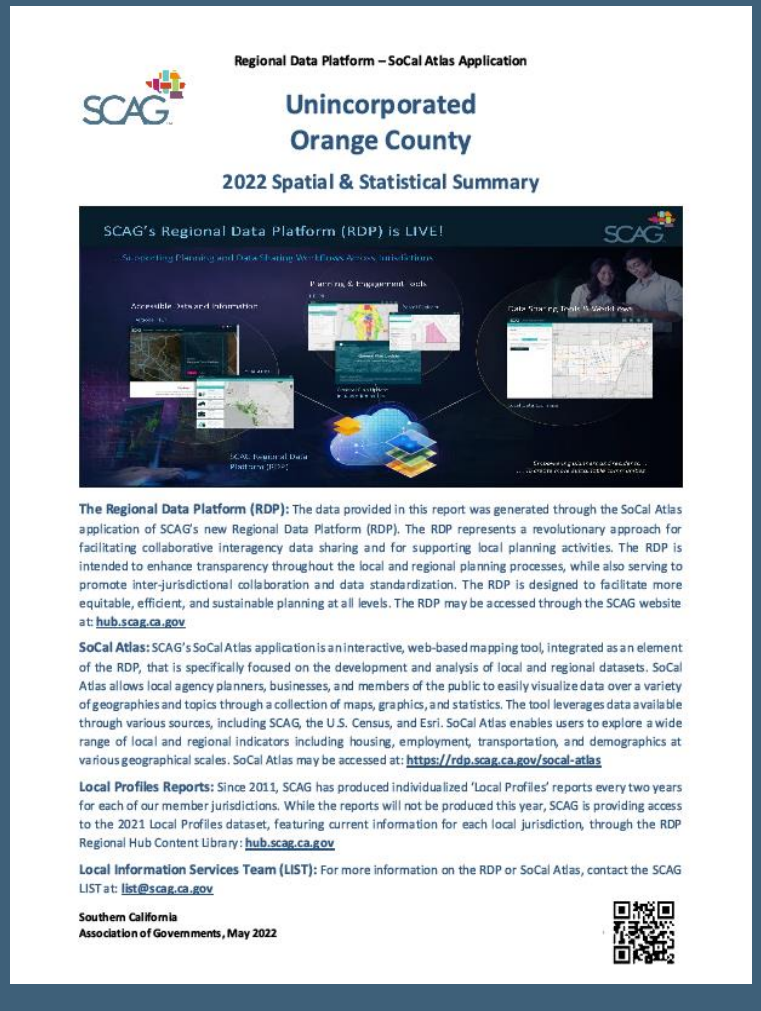
The Regional Data Platform (RDP): The data provided in this report was generated through the SoCal Atlas application of SCAG's new Regional Data Platform (RDP). The RDP represents a revolutionary approach for facilitating collaborative interagency data sharing and for supporting local planning activities. The RDP is intended to enhance transparency in the local and regional planning processes, while also serving to promote inter-jurisdictional collaboration and data standardization. The RDP is designed to facilitate more equitable, efficient, and sustainable planning at all levels. The RDP may be accessed through the SCAG website at: hub.scag.ca.gov

SoCal Atlas: SCAG's SoCal Atlas application is an interactive, web-based mapping tool, integrated as an element of the RDP, that is specifically focused on the development and analysis of local and regional datasets. SoCal Atlas allows local agency planners, businesses, and members of the public to easily visualize data over a variety of geographies and topics through a collection of maps, graphics, and statistics. The tool leverages data available through various sources, including SCAG, the U.S. Census, and Esri. SoCal Atlas enables users to explore a wide range of local and regional indicators including housing, employment, transportation, and demographics at various geographical scales. SoCal Atlas may be accessed at: https://rdp.scag.ca.gov/socal-atlas

Local Profiles Reports: Since 2011, SCAG has produced individualized 'Local Profiles' reports every two years for each of our member jurisdictions. While the reports will not be produced this year, SCAG is providing access to the 2021 Local Profiles dataset, featuring current information for each local jurisdiction, through the RDP Regional Hub Content Library: hub.scag.ca.gov

Local Information Services Team (LIST): For more information regarding the RDP or SoCal Atlas, contact the SCAG LIST at: list@scag.ca.gov

Southern California Association of Governments, May 2022



Regional Data Platform – SoCal Atlas Application

SCAG

Unincorporated Orange County

2022 Spatial & Statistical Summary

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Local Information Services Team (LIST): For more information on the RDP or SoCal Atlas, contact the SCAG LIST at: list@scag.ca.gov

Southern California Association of Governments, May 2022

SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS

Regional Data Platform

SCAG

THE REGIONAL DATA PLATFORM IS HERE!

WHAT IS THE REGIONAL DATA PLATFORM?

The RDP is a revolutionary system designed to facilitate interagency collaboration in the sharing of data and to support local and regional planning activities at all jurisdictional levels.

WHAT ARE THE GOALS OF THE RDP?

- To strengthen local planning practices through the provision of modern planning tools and the sharing of best practices to support the local General Plan update process
- To enhance the regional planning process by streamlining the collection and integration of data between local agencies and SCAG
- To promote transparency and interagency collaboration to foster a more inclusive, equitable, and sustainable regional planning practice

WHO IS THE RDP FOR?

- **Local Jurisdiction Planners**
- **Consultants, Academia**
- **Developers, Other Data Stakeholders**
- **Public, Partners, Regional Stakeholders**

BENEFITS TO LOCAL JURISDICTIONS TODAY!

- Access standardized regional datasets, information, and resources for planning via the Regional Hub
- Access to web-based tools and templates to support specific planning workflows, including Housing Element updates
- Access to out-of-the box Esri tools including ArcGIS Urban, Hub, Pro, and Business Analyst to support a wide range of common planning and resident workflows
- Ability to submit feedback or request one-on-one technical assistance through SCAG's Local Information Services Team (LIST)
- A more streamlined experience for contributing, validating, and updating local jurisdiction data shared with SCAG
- Ability to engage and collaborate with other local jurisdictions across the region to share best practices
- Participate in a growing community of planners throughout Southern California in the sharing of data, resources, and best practices

https://scag.ca.gov/data-tools-socal-atlas

SCAG Key Indicators
Anaheim, Orange County

346,824
2020 Total Population

6,899
2020 Persons Per Square Mile

110,388
2020 Total Housing Units

3.23
2020 Average Household Size

54%
2021 Renter Occupied Housing Units (%)

2021 Population Age 25+: No Diploma (%)

28%
2021 Population Age 25+: Bachelor's Degree or Higher Education (%)

13%
2019 Households Below the Poverty Level (%)

$77,839
2021 Median Household Income

$631,736
2021 Median Home Value

Data Source: 2020 data are from the 2020 Decennial Census PL-94 redistricting file which and have been processed by the California Department of Finance. 2021 data are Esri estimates (additional information on Esri demographics can be found here). 2019 data are from the American Community Survey (ACS) and have been processed and published by Esri.

SCAG Housing Statistics
Anaheim, Orange County

Total Acres

346,824

2020 Total Population

110,388

2020 Total Housing Units

46%

2021 Owner Occupied Housing Units

54%

2021 Renter Occupied Housing Units

FINAL 6TH CYCLE REGIONAL HOUSING NEEDS ASSESSMENT (RHNA) ALLOCATION

Total RHNA Allocation

3,767

Very Low Income (<50% of AMI)

2,397

Low Income (50-80% of AMI)

2,945

Moderate Income (80-120% of AMI)

8,344

Above Moderate Income (>120% of AMI)

Data Source: 2020 data are from the 2020 Decennial Census PL-94 redistricting file which has been processed by the California Department of Finance. 2021 data are Esri estimates (additional information on Esri demographics can be found here). RHNA information are from SCAG. For additional housing data for SCAG jurisdictions, please refer to the Pre-certified Local Housing Data Reports developed for 6th cycle housing element updates.

SCAG Employment Statistics
Anaheim-Orange County

EMPLOYMENT

92%
2021 Employed Civilian Population Age 16+

25%
2021 Blue Collar Workers

57%
2021 White Collar Workers

18%
2021 Service Workers

7.7%
2021 Unemployment Rate

COMMUTE

20%
2021 Workers who commute 7+ hours weekly

77.8%
2019 Workers who drive alone to work

BUSINESS

16,404
2021 Total Business Establishments

231,076
2021 Total Employees

DAYTIME POPULATION

181,114
2021 Workers

187,247
2021 Residents

Data Source: 2021 data are Esri estimates (additional information on Esri demographics can be found here). Specific information on the categorization of White Collar, Blue Collar, and Services employees can be found here, along with additional information on Daytime population counts here. 2019 data are from the American Community Survey (ACS) and have been processed and published by Esri.

SCAG COVID-19 Vulnerability Indicators: Social and Health
Anaheim, Orange County

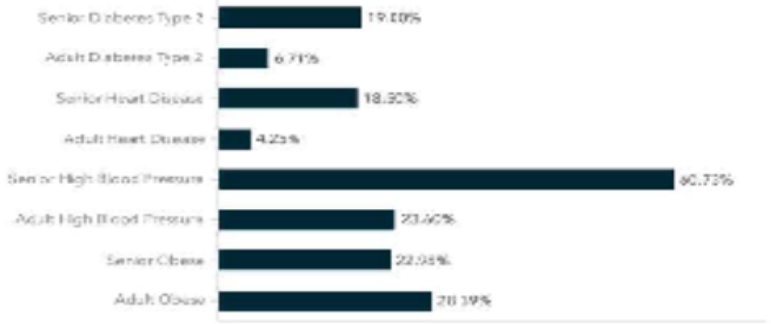
346,824	110,388	$69,443	38,895	12,494	$81,649,328
2020 Total Population	2020 Total Housing Units	Median HH Income	Senior Population	Food Stamps/SNAP	Sales and Use Taxes

Homeless Population	Value
Sheltered Homeless	508
Unsheltered Homeless	694

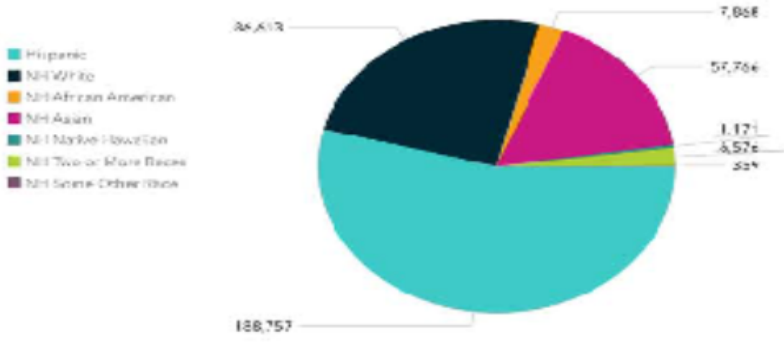
Disability Population

Insurance Coverage Population

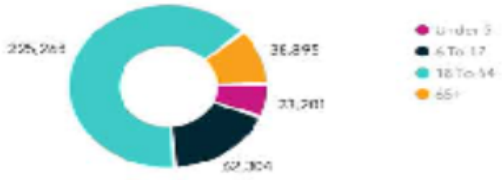
Likelihood of Health Conditions of Adults and Seniors



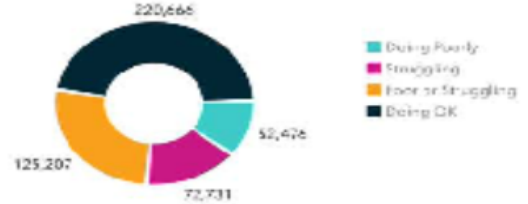
Race/Ethnicity (NH = Non-Hispanic)



Population by Age



Poverty Status Population



Data Source: SCAG, Census ACS 2013-2017 and 2014-2018, TCAC/HCD 2018, InfoUSA 2016, and State Controller 2018. 2020 are from the Demographic Census PL-94 redistricting file which has been processed by the California Department of Finance. Homeless population data processed by SCAG from county/city data sources conducting point-in-time counts, e.g. social services departments or homeless services authorities. COVID-19 has exposed health disparities and work on health equity is critical; California's Healthy Place Index application is a great tool to assess community's existing conditions. For questions, please contact Tom Vo at Vo@scag.ca.gov.

SCAG COVID-19 Vulnerability Indicators: Economy
Anaheim, Orange County

346,824	110,388	$69,443	38,895	12,494	$81,649,328
2020 Total Population	2020 Total Housing Units	Median HH Income	Senior Population	Food Stamps/SNAP	Sales and Use Taxes

Residence-Based Employee Occupations

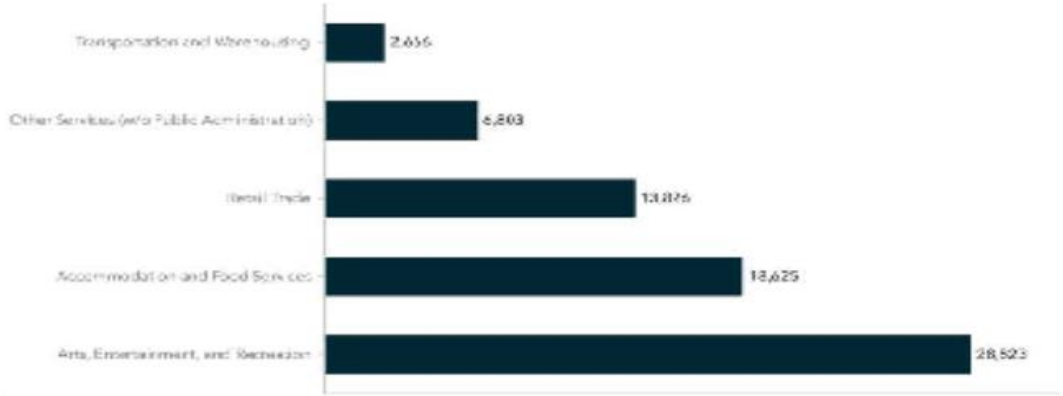
Tax Revenues

$330,526,199	$81,649,328	$154,924,612	$41,561,426	$31,735,407
Total Tax Revenues	Sales and Use Tax	Transient Occupancy Taxes	Secured and Unsecured Property Tax	Property Tax In Lieu of Vehicle License Fees

Tax Revenues (%)

24.70%	46.87%	12.57%	9.60%
Sales and Use Tax (%)	Transient Occupancy Tax (%)	Secured and Unsecured Property Tax (%)	Property Tax In Lieu of Vehicle License Fees (%)

Workplace-Based Employees

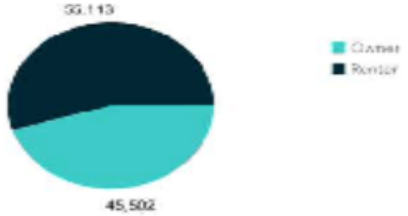


Data Source: SCAG, Census ACS 2013-2017 and 2014-2018, TCAC/HCD 2018, InfoUSA 2016, and State Controller 2018. 2020 are from the Decennial Census PL-94 redistricting file which has been processed by the California Department of Finance. Homeless population data processed by SCAG from county/city data sources conducting point-in-time counts, e.g. social services departments or homeless services authorities. COVID-19 has exposed health disparities and work on health equity is critical; California's Healthy Place Index application is a great tool to assess community's existing conditions. For questions, please contact Tom Vo at Vo@scag.ca.gov.

SCAG COVID-19 Vulnerability Indicators: Housing and Transportation
Anaheim, Orange County

346,824	110,388	$69,443	38,895	12,494	$81,649,328
2020 Total Population	2020 Total Housing Units	Median HH Income	Senior Population	Food Stamps/SNAP	Sales and Use Taxes

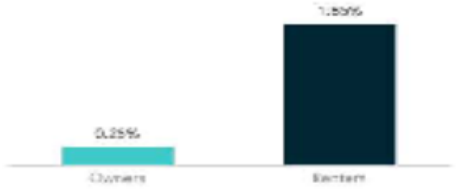
Occupied Housing Units



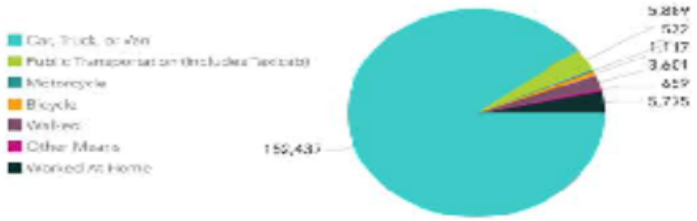
Below Poverty Level Householder

Tenure by Vehicles Available (Owner)

Overcrowded Units (>2 Person/Room)

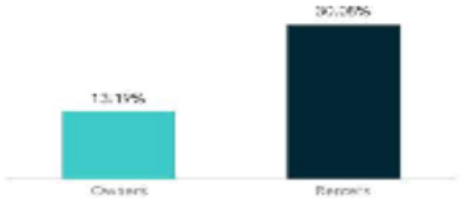


Means of Transportation

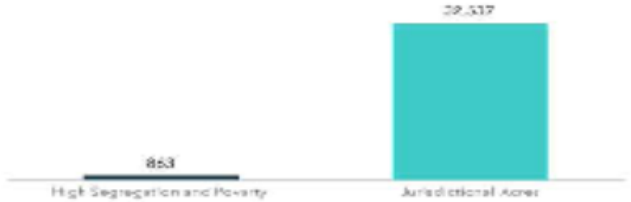


Tenure by Vehicles Available (Renter)

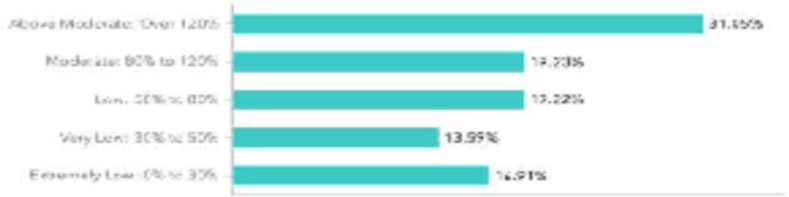
Cost-Burdened Units (Pay >50%)



High Segregation & Poverty Area



Household Income Distribution Based on County AMI



Data Source: SCAG, Census ACS 2013-2017 and 2014-2018, TCAC/HCD 2018, InfoUSA 2016, and State Controller 2018-2020 are from the Decennial Census PL-94 redistricting file which has been processed by the California Department of Finance. Homeless population data processed by SCAG from county/city data sources conducting point-in-time counts, e.g. social services departments or homeless services authorities. COVID-19 has exposed health disparities and work on health equity is critical; California's Healthy Place Index application is a great tool to assess community's existing conditions. For questions, please contact Tom Vo at Vo@scag.ca.gov.

Performance Monitoring Dashboard

- **SCAG has initiated planning for development of a regional performance reporting dashboard application.**
- **Provide web-based, interactive tool for tracking & reporting indicators at regional, county, & jurisdictional levels through use of charts, maps, & infographics.**
- **Use visualization to help promote better understanding of Connect SoCal & its regional investments.**
- **Identify & report emergent performance trends occurring over time.**

THANK YOU!

For more information, please visit:

https://rdp.scag.ca.gov/socal-atlas

Mike Gainor

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AGENDA ITEM # 5 SCAG Updates

STAFF RECOMMENDATION

Receive reports and discussion.

1. SCAG Agenda review: February 2, 2023

2. The January 19, 2023 SCAG Technical Working Group agenda packet (Item 1, attached) contains a summary report on issues pertaining to regional and subregional forecasting. https://scag.ca.gov/technical-working-group-past-agendas

3. SCAG released a high-level agenda outlook schedule for the 2024 RTP/SCS/Connect SoCal development schedule (attached) and indicated it is intending to release the draft 2024 Connect SoCal report at its October 5, 2023 Regional Council meeting. Release date for the draft PEIR is unknown. The OCCOG TAC will likely form an ad hoc subcommittee at its October 2023 meeting to review the documents and prepare comments for the OCCOG Board to review and send as official comments on the RTP/SCS & associated PEIR. Depending on the deadline for comment, special meetings of the OCCOG TAC and Board may be needed in November. It is suggested that agency staff set aside time in October and November for review of the RTP documents.

   Tentative/estimated schedule:
   - 10/3/2023- OCCOG TAC set up ad hoc review committee
   - 10/5/2023- SCAG Regional Council tentatively scheduled to release draft RTP/SCS (Connect SoCal) for review & comment
     - If 45-day review = 11/19/2023
     - If 60-day review = 12/4/20223
   - 10/19/2023- possible TWG meeting
   - 10/26/2023- Regular OCCOG Board
   - 11/2/2023- SCAG RC & Policy meeting day
   - 11/7/2023- Regular OCCOG TAC
   - 11/16/2023- Regular TWG meeting
   - November OCCOG Board- move up or back? (11/16/2023 or 11/30/2023)

ATTACHMENTS

1. SCAG White Paper: Considerations for Regional and Subregional Forecasting in California
2. SCAG Policy Committee agenda outlook for 2024 RTP/SCS

DRAFT REPORT
Considerations for Regional and Subregional Forecasting in California

A Report for the Southern California Association of Governments (SCAG)

Produced by Population Reference Bureau (PRB)

January 2023

Purpose

The purpose of this report is to identify best practices for aligning regional and subregional forecasting for regional transportation planning organizations in California. This report will review best practices for forecasting methods and data as well as consider the statutory and regulatory frameworks in which regional transportation planning organization operate.

Background

Although regional transportation planning organizations go by a variety of names, including metropolitan planning organizations (MPOs) and councils of government (COGs), they each serve as the primary transportation planning agency for metropolitan areas throughout the United States. Regional transportation planning organizations are the channel through which federal transportation funds are allocated, and for more than five decades, they have been responsible for continuing, comprehensive, and cooperative transportation planning. This planning includes maintaining a long-range transportation plan, known as a Metropolitan Transportation Plan or Regional Transportation Plan, and maintaining short-range Transportation Improvement Programs. Through these long- and short-range plans, regional transportation planning organizations are responsible for transportation planning to improve a region's air quality, increase mobility for residents, and improve transportation safety within a region.

In addition to transportation planning, regional transportation planning organizations may also serve a variety of other functions. Since passage of SB 375 in 2008, in California these functions have included developing a sustainable communities strategy (SCS) to meet state-mandated greenhouse gas reduction targets. When the Bipartisan Infrastructure Bill of 2021 was enacted, carbon reduction planning also became a federal requirement. In California, MPOs/COGs also play a crucial role in the Regional Housing Needs Allocation (RHNA) process.

In order to support their various mandated short- and long- range planning activities, MPOs/COGs develop forecasts of expected future conditions. These regional growth forecasts often include population, housing and/or households, employment, land use, and transportation conditions for the metropolitan region as a whole and for subregional areas such as incorporated jurisdictions, transportation analysis zones, or other subcounty geographies. The finest-scaled subregional forecasts may attempt to predict future conditions at a parcel, or tax lot, level.

Forecast Terminology:
The word *forecast* is typically used to imply a likely or expected future outcome. The word *projection* implies an expected or desired outcome given a set of assumptions or under a given scenario. However, in the regional planning context scenario exercises (projections) are often referred to as forecasts or forecast scenarios. For that reason, throughout this report the terms will be used interchangeably.

Both regional and subregional forecasts are described in more detail below.

Purpose of Regional Growth Forecasts

Regional growth forecasts are used within MPOs/COGs for a wide variety of purposes, but their primary purpose is to serve as a common starting point for developing subregional population, employment, and land use patterns that inform regional transportation models. Those transportation models are then, in turn, used to develop transportation plans.

Long-range transportation plans must have a horizon at least 20 years into the future—and often extend 25 years or more—and are updated every four years.[1] Thus, regional forecasts are generally updated every four years.

Regional Growth Forecasts and California Housing Policy

In California, the population component of the regional growth forecast is also relevant to the regional housing need determination step in the Regional Housing Needs Allocation (RHNA) process.

California state housing law (California Government Code, Chapter Title 7, Division 1, Chapter 3, Article 10.6. 65584.01) states:

> *If the total regional population forecast for the projection year, developed by the council of governments and used for the preparation of the regional transportation plan, is within a range of 1.5 percent of the total regional population forecast for the projection year by the Department of Finance, then the population forecast developed by the council of governments shall be the basis from which the department determines the*

[1] Under federal law, some metropolitan planning organizations are on a five-year cycle for plan updates, rather than four. See U.S. Code, Title 49 https://www.govinfo.gov/content/pkg/USCODE-2020-title49/pdf/USCODE-2020-title49-subtitleIII-chap53-sec5303.pdf.

> *existing and projected need for housing in the region. If the difference between the total population projected by the council of governments and the total population projected for the region by the Department of Finance is greater than 1.5 percent, then the department and the council of governments shall meet to discuss variances in methodology used for population projections and seek agreement on a population projection for the region to be used as a basis for determining the existing and projected housing need for the region. If agreement is not reached, then the population projection for the region shall be the population projection for the region prepared by the Department of Finance as may be modified by the department as a result of discussions with the council of governments.*

Although there is no rule *requiring* COG population projections to be within 1.5% of the Department of Finance (DOF) forecast, many COGs aim for this target. Most immediately, being within the statutory target range of DOF's forecast may streamline the RHNA consultation between the COG and the California Department of Housing and Community Development (HCD).[2] In addition, having a forecast that is similar to an independent forecast, such as DOF's, can help build the case for forecast plausibility.

Uncertainty in Regional Growth Forecasts

With any forecast, there is a degree of uncertainty, and transportation models are no exception. Regulators and thought leaders in the sector have described the uncertainty inherent in producing long range growth forecasts. For example, a 2004 report by the Federal Highway Administration notes: "Predictions for socioeconomic factors, such as population, ethnicity, employment, income, and household sizes, are generally feasible, albeit imperfect, provided the geographical area is adequately large. Predictions for trends based on technological innovation, social change, or legislative factors, however, are much more difficult."[3]

The same Federal Highway Administration report also acknowledges that predictions tend to be more accurate for trends that are less susceptible to sudden change, such as total housing stock, and for larger geographic areas compared with smaller ones. Similarly, in a 2007 report the Transportation Research Board notes that forecast accuracy is likely to be higher in regions that are growing slowly or are stable, compared with more rapidly changing regions.[4]

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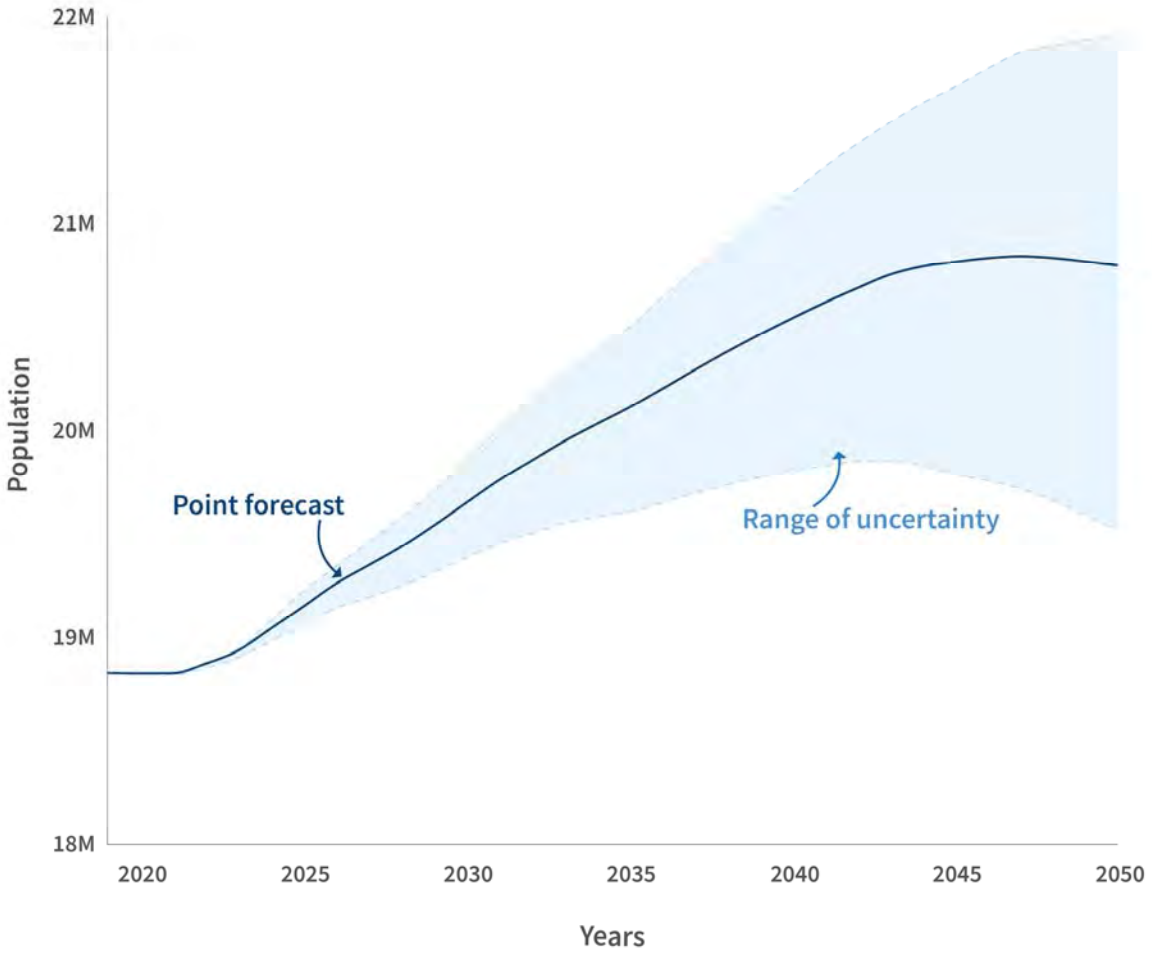
[2] In practice this streamlining has not always been the case. There are instances, such as SCAG's 6th Cycle RHNA, where HCD rejected use of the COG forecast, citing differences in age structure, despite the SCAG forecast meeting the statutory requirement.

[3] John S. Miller. (2004.) The Uncertainty of Forecasts. U.S. Department of Transportation, Federal Highway Administration. https://highways.dot.gov/public-roads/septemberoctober-2004/uncertainty-forecasts

[4] Transportation Research Board. (2007.) Metropolitan Travel Forecasting: Current Practice and Future Direction. https://onlinepubs.trb.org/onlinepubs/sr/sr288.pdf

While transportation models are generally based on a point forecast, it can be instructive for planners and policymakers to see a range of regional growth forecast possibilities that reflect inherent forecast uncertainty. (See Figure 1.) Showing low, middle, and high forecast ranges may be particularly useful in California as the state's growth trajectory has changed. After decades of slow but steady growth, California recently entered a period of population decline, driven largely by a dramatic drop-off in international migration from 2017-2021 that was largely driven by federal policies and the COVID-19 pandemic.[5]

Figure 1: Regional Forecast Uncertainty Grows Over Time



Recent changes to population growth trajectories in California—which include both slowing growth and aging population—suggest that future plans may need to grapple with stable or shrinking population concurrent with continued increase in demand for housing and the

[5] PRB analysis of data from the California Department of Finance and U.S. Census Bureau.

associated changes in transportation demand that such reversals from prior trends may entail.[6] Expressing forecast uncertainty now can facilitate planning discussions in the future and can help the region's decisionmakers plan for a variety of potential future outcomes.

Purpose of Subregional Growth Forecasts

As with regional forecasts, subregional forecasts are used for a wide variety of purposes, but their primary purpose is to translate regional growth expectations into the spatially disaggregated population, employment, and land use patterns that inform the regional transportation models that underpin transportation plans. Subregional models typically use the regional forecast as a control total and then disaggregate the forecast based on space available (sometimes referred to as capacity or planned capacity) and expected development trends.

As noted above, long-range transportation plans must have a horizon at least 20 years and are updated every four years. Thus, subregional forecasts are also updated every four years. Both regional and subregional forecasts are also generally incorporated into environmental review of the transportation plan.[7]

Subregional Growth Forecasts and California Planning Policy

California Government Code Section 65080(b)(2)(B) declares that each metropolitan planning organization must prepare a sustainable communities strategy (SCS) that meets the following criteria:

> *Each metropolitan planning organization shall prepare a sustainable communities strategy, subject to the requirements of Part 450 of Title 23 of, and Part 93 of Title 40 of, the Code of Federal Regulations, including the requirement to use the most recent planning assumptions considering local general plans and other factors. The sustainable communities strategy shall (i) identify the general location of uses, residential densities, and building intensities within the region, (ii) identify areas within the region sufficient to house all the population of the region, including all economic segments of the population, over the course of the planning period of the regional transportation plan taking into account net migration into the region, population growth, household formation and employment growth, (iii) identify areas within the region sufficient to house an eight-year projection of the regional housing need for the region pursuant to*

[6] This seeming paradox of population and housing growth trends moving in opposite directions is anticipated because population aging. Household formation rates rise with age, and there is a higher likelihood of living alone at older ages. Thus, as the region's population ages, more housing will likely be needed, even if the total population remains stable or shrinks slightly.

[7] U.S. Code Title 23, Chapter 1, §168 https://uscode.house.gov/view.xhtml?req=%22population+and+employment%22&f=treesort&fq=true&num=1&hl=true&edition=prelim&granuleId=USC-prelim-title23-section168

> *Section 65584, (iv) identify a transportation network to service the transportation needs of the region, (v) gather and consider the best practically available scientific information regarding resource areas and farmland in the region as defined in subdivisions (a) and (b) of Section 65080.01, (vi) consider the state housing goals specified in Sections 65580 and 65581, (vii) set forth a forecasted development pattern for the region, which, when integrated with the transportation network, and other transportation measures and policies, will reduce the greenhouse gas emissions from automobiles and light trucks to achieve, if there is a feasible way to do so, the greenhouse gas emission reduction targets approved by the state board, and (viii) allow the regional transportation plan to comply with Section 176 of the federal Clean Air Act (42 U.S.C. Sec. 7506).;*

In short, California Government code implies that there should be alignment between the SCS and RHNA housing allocations. However, even though the SCS must meet these criteria, including identifying sites for future population, housing, and employment growth, the SCS does not supersede local land use authority. While it is possible that local land use authorities may amend general plans and zoning to align with the SCS, there are few mechanisms to ensure that those alignments occur.

Complicating matters, the amount of housing that must be planned for through RHNA has increased dramatically. In 2018, SB 828 changed the formula used to determine "*an eight-year projection of the regional housing need for the region pursuant to Section 65584.*" These statutory changes to the methodology resulted in substantially higher housing need determinations than under prior law.[8] As a result, the gap between local land use plans and the SCS appears to be growing.

The growing gap between local land use plans and the SCS may make the SCS increasingly unsuitable for other purposes, which are described in more detail below. The gap may also increase uncertainty in the subregional forecast.

Uncertainty in Subregional Growth Forecasts

As noted above, there is considerable uncertainty in forecasting. That uncertainty is magnified for smaller geographic areas, smaller populations, and trends that experience volatility. In a 2007 report the Transportation Research Board (TRB) notes:

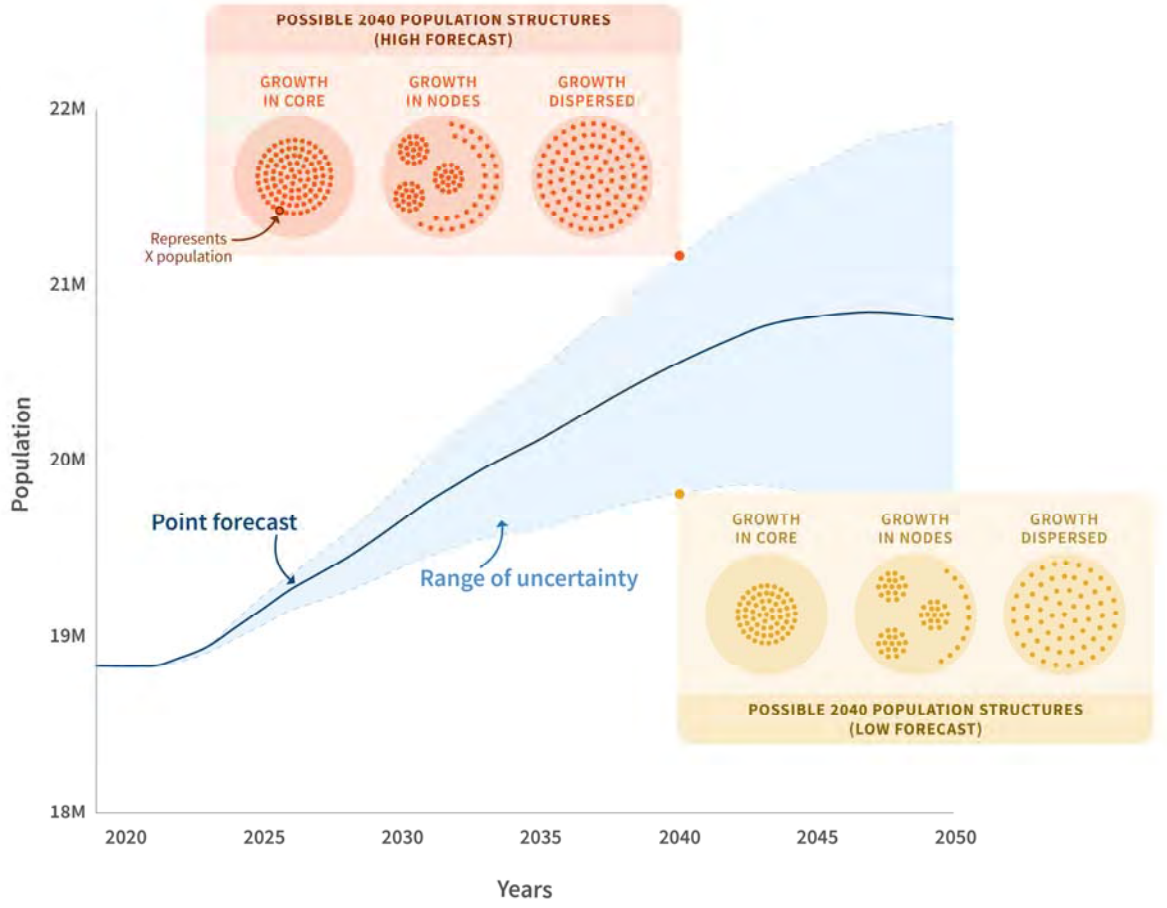
> *In metropolitan regions that are growing slowly or are stable, regional errors in demographic forecasts are likely to be small; in more rapidly changing regions, greater errors in demographic forecasts would be expected. There may be considerably more uncertainty in allocating regional demographic forecasts to subareas. If an area is*

[8] Association of Bay Area Governments. Housing Element Law Changes from 1969 to the Present. https://abag.ca.gov/sites/default/files/rhna_background.pdf

> *undergoing steady or even dramatic growth, one can predict future regional population and employment with some confidence; where those people and jobs are going to go within the region is far more uncertain.*[9]

Specifically, subregional forecasts have all of the uncertainties inherent in regional forecasts as demographic and economic trends shift over time. They also have the additional uncertainty that comes with adding a new dimension of forecasting—space. (See Figure 2.) With subregional forecasts, development patterns may shift over time toward more compact or fringe development, and may be affected by forces such as transit preferences, urban flight, or gentrification. In other words, subregional forecasting has a higher degree of uncertainty than regional forecasting.

Figure 2: Subregional Forecasts Include Uncertainties Over Both Time and Space



[9] Transportation Research Board. (2007.) Metropolitan Travel Forecasting: Current Practice and Future Direction. https://onlinepubs.trb.org/onlinepubs/sr/sr288.pdf

As with regional forecasting, *short*-range subregional forecasting may be less uncertain than *long*-range subregional forecasting. In the near term there may be little reason to expect population, housing, or employment to change from their current levels and locations. Given the timeline for the permitting process, major changes such as a new development are likely already known by local planning staff and can be factored into the short-range forecast with a high degree of confidence (if not complete certainty).

Subregional forecasts are likely to be more accurate in the short term because pipeline projects and entitlements are known with some certainty and drive most of the change expected in the first five-10 years of a forecast. However, there is considerably more uncertainty in long-range subregional forecasts, as demographic shifts, market forces, environmental considerations, and other factors get increasingly difficult to predict the farther one is from the base year of the forecast.

As a result of this uncertainty, in their report TRB suggests that "A better use of travel models might be for analysis of outcomes of a range of transportation alternatives, considering different scenarios of future urban development."[10]

In practice, many COGs do consider one or more subregional forecasts—often under the heading of alternative land use patterns—as part of their plan environmental impact reports (PEIRs). Analysis of land use alternatives could begin to address the uncertainty inherent in subregional forecasting. However, in practice, PEIR subregional alternative forecasts are often extremes—such as focusing all future growth in transit hubs—that are better suited for analyzing transportation network sensitivity than reflecting a true range of anticipated future outcomes.

In addition, as noted above, because the SCS does not have to conform to existing general plans and zoning—nor do general plans and zoning need to change to reflect the SCS—the SCS introduces an additional level of uncertainty in subregional forecasts. On one hand, requirements to reduce greenhouse gas emissions may result in SCS land use assumptions that, for example, concentrate future housing in infill developments near transit. While this approach is commendable for resource conservation, infill projects have historically faced lengthy and difficult approvals processes, making their outcome far from certain even if the local land use authority puts the necessary zoning rules into place. On the other hand, projects in the SCS are linked to California Environmental Quality Act (CEQA) streamlining opportunities. Thus, for example, a dense, transit-adjacent development being included in the SCS may increase the likelihood of development or redevelopment and thereby reduce subregional forecast uncertainty. The interplay between these forces requires further study.

[10] Transportation Research Board. (2007.) Metropolitan Travel Forecasting: Current Practice and Future Direction. https://onlinepubs.trb.org/onlinepubs/sr/sr288.pdf

Other Planning Purposes of Subregional Growth Forecasts

In addition to their role in mandated transportation and housing planning, subregional forecasts are used by other local governments for planning purposes; they are frequently used by water, wastewater, and other infrastructure planning agencies, as well as public health agencies and school districts. Subregional forecasts may also help inform general plan or zoning updates. And businesses, nonprofits, educational institutions, health care providers, emergency response agencies, and other groups may use subregional forecasts for their planning.

For these auxiliary uses, the scenarios of future urban development that are most helpful are those that are most reasonably anticipated to occur. To the extent that the SCS anticipates—or even spurs—changes in future development patterns, an SCS-based subregional forecast could be useful for wastewater or school planning. However, as noted above, the levels, locations, and intensities of development required in the SCS to meet RHNA and greenhouse gas reduction targets may be dramatically different from historical growth patterns.

The SCS may represent one possible future development scenario, but other users may not find it to be the most likely projection (and therefore the most appropriate) for their uses. For example, a county transportation commission that is planning for infrastructure demand may find that SCS growth patterns are unexpected or are less consistent with their planning needs and applications. As one example, local government agencies in San Diego County have expressed concern about using the San Diego Association of Government's 2021 SCS—rather than the general plan-based subregional forecast they were accustomed to—for planning other infrastructure (such as water and wastewater). To meet multiple user needs, the agency ultimately published two forecasts—the SCS-based forecast and a more traditional one—as part of their most recent transportation plan.

As the examples above illustrate, part of the challenge with using the SCS for other planning purposes may be in helping data users understand the shift from a general plan-based forecast to a policy-based one, as well as the uncertainties inherent in any subregional forecast. Explaining uncertainties in both types of subregional forecasts (general plan-based and SCS/policy-based) may help alleviate concerns and/or help agencies select the right type of subregional forecast for their intended use.

Policy Considerations and Shifting Legislative Requirements

Federal law imposes many requirements on regional transportation planning, and thus on the regional and subregional growth forecasts that underpin that planning. This includes guidance on alignment between the transportation plan, housing need, and economic development. U.S. Code Title 23, Chapter 1, § 134 states:

> *In general.-The Secretary shall encourage each metropolitan planning organization to consult with officials responsible for other types of planning activities that are affected by transportation in the area (including State and local planned growth, economic*

development, housing, tourism, natural disaster risk reduction, environmental protection, airport operations, and freight movements) or to coordinate its planning process, to the maximum extent practicable, with such planning activities.

(C) Housing coordination plan.-

(i) In general.-A metropolitan planning organization serving a transportation management area may develop a housing coordination plan that includes projects and strategies that may be considered in the metropolitan transportation plan of the metropolitan planning organization.

(ii) Contents.-A plan described in clause (i) may-

(I) develop regional goals for the integration of housing, transportation, and economic development strategies to-

(aa) better connect housing and employment while mitigating commuting times;

(bb) align transportation improvements with housing needs, such as housing supply shortages, and proposed housing development;

(cc) align planning for housing and transportation to address needs in relationship to household incomes within the metropolitan planning area;

(dd) expand housing and economic development within the catchment areas of existing transportation facilities and public transportation services when appropriate, including higher-density development, as locally determined;

(ee) manage effects of growth of vehicle miles traveled experienced in the metropolitan planning area related to housing development and economic development;

(ff) increase share of households with sufficient and affordable access to the transportation networks of the metropolitan planning area;

(II) identify the location of existing and planned housing and employment, and transportation options that connect housing and employment; and

(III) include a comparison of transportation plans to land use management plans, including zoning plans, that may affect road use, public transportation ridership, and housing development.

Within California, legislative changes that began in 2008 now require that housing planning (RHNA) and transportation planning (RTP/SCS) be coordinated. Housing, land use, and transportation planning should be integrated to help meet the state's housing goals and to help reduce greenhouse gas emissions.

In addition, state legislative changes beginning in 2017 changed the relationship between long-range forecasts and the housing planning target envisioned in the 6th cycle RHNA.[11] Most notably, HCD's RHNA determination now includes explicit measures of *existing* housing needs—

[11] Housing Element and RHNA Law: Recent Reforms
https://shou.senate.ca.gov/sites/shou.senate.ca.gov/files/RHNA%20reform%20fact%20sheet%20-%2010.2021.pdf
Housing Element Law: Changes from 1969 to the Present
https://abag.ca.gov/sites/default/files/rhna_background.pdf

specifically new policies on vacancy rate adjustments as well as new factors for overcrowding and cost burden rates. Due to these changes, the RHNA determination is no longer an expectation of future housing need—which was at least loosely aligned with expected future housing growth—but a reflection of both *existing and future need*.

To put the shift into perspective, some regions saw 6th cycle determinations double (for example, Association of Bay Area Governments, Council of San Benito County Governments, Santa Barbara County Association of Governments) or triple (for example, SCAG, Association of Monterey Bay Area Governments) what they were in the 5th cycle.

It is clear that these dramatic shifts in RHNA determination are driven by the change in law to incorporate existing housing need, as regions that received their 6th cycle determination before the law change (including the San Diego Association of Governments) saw almost no change in their determination between the 5th and 6th cycles. Measures of existing need now comprise the majority of HCD's determination of the SCAG region's total housing need of 1,341,827 units for the 6th cycle (2021-2029).

In the 5th cycle, RHNA determinations for the eight-year planning horizon typically accounted for less than 40% of each region's predicted household growth over their 20-30-year long-range transportation plan horizon. For example, SCAG's 5th cycle RHNA determination was a range 409,060-438,030. At the same time, the SCAG regional growth forecast was a net increase of 1,472,000 households over the 25-year planning horizon (from 5,853,000 households in 2010 to a predicted 7,325,000 households by 2035). The upper end of SCAG's RHNA determination range (438,030) reflects about 30% of the household growth predicted over the long-range horizon.

In contrast, RHNA determinations for the 6th cycle eight-year planning horizon are closer to the number of households projected for the entire 20-30 year transportation plan horizon. For example, SCAG's 6th cycle RHNA determination for the eight-year horizon was 1,341,827. Compared with the contemporaneous forecast, which showed a change of 1,621,000 households (from 6,012,000 in 2016 to 7,633,000 in 2045), the 6th cycle RHNA reflects more than 80% of the household growth predicted over the long-range horizon. In at least one region, the 6th cycle targets for the eight-year RHNA planning horizon exceed projected household growth in the long-range (20-30 year) planning horizon.[12]

To understand why the change in housing policy is significant for regional and subregional growth forecasting, one additional feature of RHNA is important. The RHNA process requires local jurisdictions to identify sites and zoning, pursuant to additional parameters, that can

[12] Analysis by PRB of publicly-available data for 5th and 6th cycle RHNA from California Department of Housing and Community Development. https://www.hcd.ca.gov/planning-and-community-development/regional-housing-needs-allocation

accommodate the determined number of units region-wide. The policy goal of these changes to RHNA is that mandatory rezoning will lead to increased housing supply. However, the RHNA process does not require that housing be constructed at those sites (or anywhere within a jurisdiction).

In contrast to a housing planning goal, regional and subregional growth forecasts are an expert-derived assessment of reasonably foreseeable future growth over a set forecast horizon. The expert assessment is informed by historical trends (including in other, similar regions), available space and constraints to development, and reasonably anticipated policy or trend changes. "Reasonably foreseeable" growth includes assessing the possible impact of policies, including RHNA-related zoning changes, but also must consider other factors like market forces that will affect future growth.

Aligning the SCS and RHNA in the SCAG Region

When the RHNA determination was more closely aligned with future need (that is, in past RTP/SCS cycles), SCAG produced an integrated forecast where jurisdiction-level household growth totals matched the RHNA housing unit allocations for those jurisdictions.

SCAG's preliminary regional projections were released in February 2022, and the region is expected to grow by 1.7 million people, 1.5 million households, and 1.3 million jobs. In all three measures, expected regional growth is lower than in Connect SoCal 2020 (the forecast associated with 6th cycle RHNA) due to several factors (such as changes in fertility, mortality, and migration; the release of 2020 Census data; and COVID-19). However, household growth over the Connect SoCal horizon is still expected to exceed the 6th cycle RHNA housing unit need region wide.

Developing Connect SoCal 2024 requires SCAG to allocate this preliminary regional forecast to the jurisdictional and neighborhood levels using a variety of data and techniques. Local jurisdictions then review the data before it is integrated into the regional plan.[13] The 6th cycle of RHNA has the potential to substantially increase the number of sites available for housing, especially in jurisdictions with RHNA allocations that exceed prior RTP/SCS forecasts. As such, SCAG's preliminary growth forecast at the jurisdiction and neighborhood levels, released May 23, 2022, sought to reflect capacity changes from the 6th cycle of RHNA, as RHNA is an adopted policy with a large potential impact on household growth by 2050.

However, since many jurisdictions' housing elements are incomplete and the rezonings associated with them may not be due until October 2024, data on newly available sites are inherently incomplete. Furthermore, the SCAG region's lower population and household

[13] See www.scag.ca.gov/local-data-exchange.

growth outlook compared to the 2020 plan make it extremely unlikely that all jurisdictions' household forecasts will exceed the RHNA target from a demand-side perspective.

In addition, RHNA planning is just one factor that must be considered in future anticipated subregional growth. Environmental concerns such as reducing greenfield development and climate concerns such as sea level rise, drought, and wildfire, may affect future development patterns in ways that are not yet fully understood. More immediately, recent experiences around water supply in Monterey County—where a cease-and-desist order from the state resulted in the inability to build new housing, even in areas with planned capacity and high demand for housing—may portend additional uncertainties for housing development in other parts of California.[14]

In summary, it is not expected or required that every SCAG jurisdiction's household forecast exceed their 6th cycle RHNA allocation, as the RHNA number may not be the most likely outcome when all opportunities and constraints are considered. However, the expectation during the plan development process is that SCAG and local jurisdictions take into account the increase in available sites resulting from RHNA when developing the Connect SoCal 2024 household forecast.

Summary of SCAG Past Practices

SCAG's regional and subregional growth forecast practices are described below.

Regional Forecast

In the current cycle and for the last several plan cycles, SCAG has used a coupled demographic/economic forecast process to produce its regional growth forecast. The three models in this process, and their interrelationships, are shown in Figure 3 below.

SCAG projects population using a cohort-component model. Cohort-component models are widely used in population forecasting and are based on the demographic equation that population at a future point is equal to the existing population plus births and in-migrants and minus deaths and out-migrants.[15]

SCAG's age, sex, and race/ethnicity-specific population forecasts are assigned to group quarters or household populations, based on historical patterns of group quarters residence. Group quarters populations are expected to live in dorms, barracks, prisons, or other group residential

[14] Monterey County Now. "The state says the Peninsula must build, but also holds back on water." https://www.montereycountyweekly.com/opinion/local_spin/the-state-says-the-peninsula-must-build-but-also-holds-back-on-water/article_e607987a-c65e-11ec-b8f4-afd0dae88c90.html

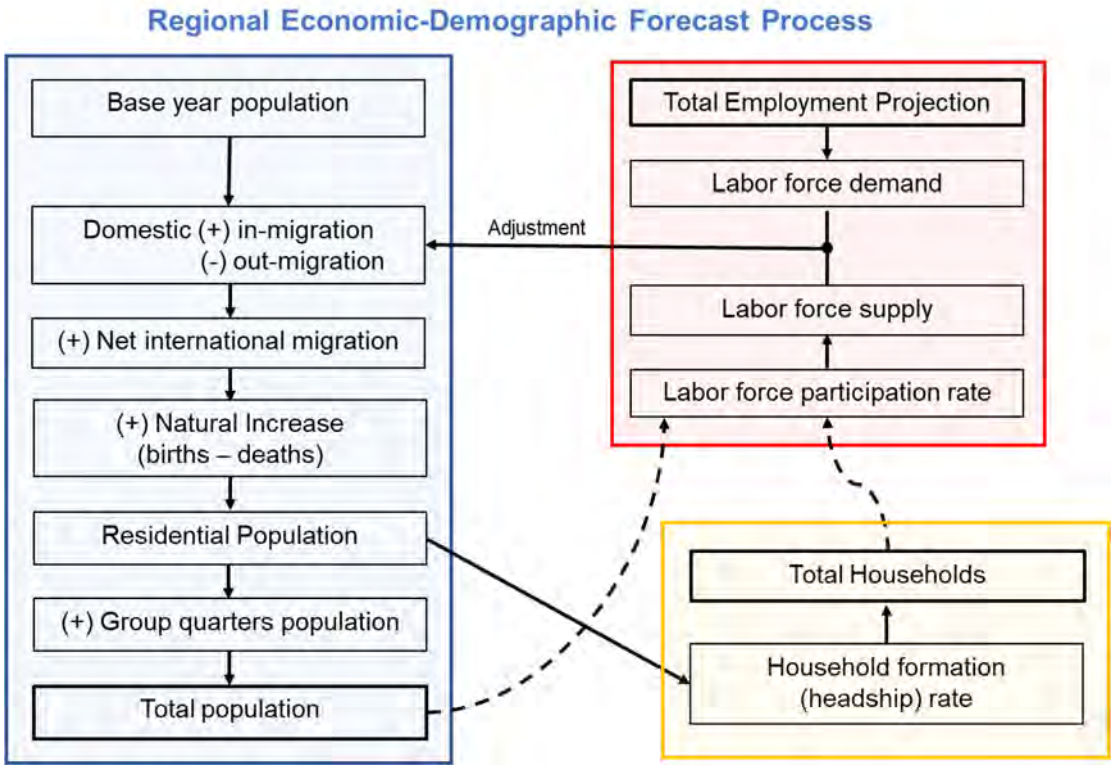
[15] Thomas Wilson, Irina Grossman, Monica Alexander, Philip Rees, Jeromey Temple, "Methods for small area population forecasts: state-of-the-art and research needs,"SocArcXiv (2021), https://osf.io/preprints/socarxiv/sp6me/.

facilities such as assisted living facilities. Household populations are expected to live in housing such as single family homes, apartments, condos, or similar residential structures. Household population data are multiplied by a set of household formation (headship) rate assumptions to generate a disaggregated forecast of households. Similarly, labor force supply is projected by applying labor force participation and double-jobbing rates to the population.

SCAG projects employment using a shift-share model. To ensure model sensitivity to demographic trends, the cohort component, household, and labor force components of the model rely on male and female population by single year of age and eight racial/ethnic groups.

In each forecast cycle, SCAG presents the forecast framework, assumptions, and results to a Panel of Experts for review and feedback.

Figure 3: Regional Forecast Framework Includes Interrelationships Between Population, Jobs, and Housing



For more information see SCAG, "Regional Forecasting," https://scag.ca.gov/regional-forecasting.

Subregional Forecast

For the 2016 RTP/SCS, SCAG used the Small Area Dynamic Allocation Model (SADAM) for producing the subregional growth forecast, including population, household, and employment at City/Tier 2 transportation analysis zone (TAZ) levels for years 2012, 2020, 2035, and 2040.

For the 2020 RTP/SCS, SCAG used a similar approach, and coordinated with local jurisdictions through a process referred to as the Bottom-Up Local Input and Envisioning Process that facilitated the collection of local land use information and alignment with regional priorities, such as focusing growth near destinations and mobility options, promoting diverse housing choices, and promoting a green region.[16]

For the 2024 RTP/SCS, SCAG's subregional allocation will be based on a model that will be used to fit jurisdiction-level household growth to county control totals.[17] Key inputs include SCAG's estimate of remaining general plan capacity, the 6th cycle RHNA allocation, and the regional growth forecast.

SCAG's jurisdiction-level estimate of remaining general plan capacity is a starting point for subregional forecast development and is based on the following parcel-level data attributes (to the extent they are available):

- General plan designation, using the most current version available to SCAG as of late 2021.
- Mid-point estimate within practical range of general plan capacity.
- Existing households, using existing land use data and block-level 2020 Census household counts.

To collect local input, SCAG is engaging with jurisdictions one-on-one through the Local Data Exchange (LDX) process.[18] This process aligns with SCAG's objective of rooting subregional forecasts in local planning policies.[19] SCAG's other two objectives are that subregional forecasts are steered by the regional vision outlined in Connect SoCal (September 2020), and that they align with state policy, including the 6th cycle RHNA and SB 375 greenhouse gas emission reduction targets.

Alignment With RHNA

As noted above, in prior cycles the amount of growth implied by the eight-year RHNA was often similar to short-range projections for the region and typically was well within the growth expected within the long-range regional planning horizon. However, 6th cycle housing

[16] SCAG, "Connect SoCal Growth Vision Methodology," https://scag.ca.gov/sites/main/files/file-attachments/growth-vision-methodology.pdf?1603148961

[17] For more details on the 2024 model logic, refer to "SCAG Connect SoCal 2024 Preliminary Growth Forecast Methodology 4/28/22" https://mcusercontent.com/6d9ce5b9d2344154fc34fcc09/files/7ea992cc-a814-07b8-d8ef-44441864bab5/TWG_PrelimSEDMethodology_042822.pdf?utm_source=SCAG+Community&utm_campaign=8250ec4f84-TWG_2022_05_02&utm_medium=email&utm_term=0_d8c0406cae-8250ec4f84-1301169010

[18] Local Data Exchange Process Work Plan report to the Technical Working Group, January 2022, https://scag.ca.gov/sites/main/files/file-attachments/twg012022fullpacket.pdf#page=95.

[19] SCAG, "Connect SoCal Growth Vision Methodology," https://scag.ca.gov/sites/main/files/file-attachments/growth-vision-methodology.pdf?1603148961

determinations are much closer to the total projected household growth for the 20-30 year long-range horizon.

SCAG's intent is to accommodate RHNA household targets at the regional level within the long-range planning horizon. However, some jurisdictions' RHNA targets would require a heretofore unseen level of development types—such as a small jurisdiction with predominantly single-family housing and no vacant land needing to redevelop large areas to high-density multifamily to meet their RHNA goal. Even if the jurisdiction rezones, market forces may make such redevelopment unlikely. Furthermore, it may take up to three years for housing elements and general plans to align with RHNA.

Forecasting at the subregional level relies on plan capacity, historical development trends, and constraints to development including both physical constraints (such as steep slopes and floodplains) and economic constraints (such as the relative costs of redevelopment/infill compared with greenfield development). As such there may be little evidence used in standard forecasting practice to support the contention that meeting RHNA numbers in every jurisdiction is the "most likely" future. This is especially true when a RHNA allocation is lower than the long-range expectation in *other* jurisdictions.

Dissemination Practices

SCAG has historically published region- and county-level data from the regional growth forecast, as well as jurisdiction-level data from the subregional forecast as part of a draft and final adopted plan. Preliminary TAZ-level forecasts are shared online, but data are caveated as being provided only for "required modeling purposes." Final TAZ-level data have historically only been shared under data sharing agreements; however, may be considered public record based on the California Public Records Act (CPRA) and subject to disclosure.

Summary of Survey of Peer Practices

In May 2022, PRB surveyed five of the largest MPOs/COGs in California: Association of Monterey Bay Area Governments (AMBAG), Metropolitan Transportation Commission/Association of Bay Area Governments (MTC/ABAG), Sacramento Area Council of Governments (SACOG), San Diego Association of Governments (SANDAG), and Santa Barbara County Association of Governments (SBCAG). The survey was conducted online using the Survey Monkey platform.

PRB asked each MPO/COG to rank, in order of importance, the key uses of their combined regional/subregional modeling. In response, every group ranked Sustainable Communities Strategy (SCS) or transportation planning/modeling as their most important use. Housing planning/RHNA and other regional planning purposes received middle rankings, and all respondents ranked fiscal planning as least important.

Peer Practices for Regional Growth Forecasts

PRB also asked each MPO/COG about their forecast production. All five MPOs/COGs produce a point projection for their forecast. Only SBCAG produces forecast ranges, in addition to their point forecast. SANDAG is considering producing ranges for their next forecast.

When asked to rank factors for consideration in developing a regional forecast, the surveyed MPOs/COGs ranked economic/job trends and demographic trends highly. Factors ranking in the middle included state policies that may increase housing supply, change/greenhouse gas (GHG) target, infrastructure, and local land use plans/zoning. At the bottom of most lists were technological change and resource availability (such as water).

Responses to the question "What revisions do you make to the regional forecast between preliminary acceptance (such as a version accepted for planning purposes) and final (such as the forecast in the adopted/approved RTP/MTP/SCS)?" were mixed. Multiple responses were allowed.

- Two respondents noted no changes between their preliminary and final forecasts.
- Three said they revise to reflect the latest data and community and stakeholder input.
- Two said they revise to reflect state policies and changes to state policies (such as RHNA).
- Two said they revise to reflect local land use plans and policies.

Peer Practices for Subregional Growth Forecasts

The question "What model or method do you use for subregional allocation?" generated a wide variety of answers, from models based on prior growth patterns to simulation models to scenario-driven projections.

- Among the trend-driven approaches, one MPO/COG reported a bottom-up approach, with employment based on existing shares of jobs within the region and population based on trends. Another reported using a top-down, shift-share approach for employment and population, which is then bounded by reasonably anticipated growth given local constraints to development.
- Two MPOs/COGs said they relied on simulation models for their subregional forecast. One appeared to use a scenario-driven approach described as "an iterative process of examining planning regulatory environments, proxies for market demand, and policy factors" to allocate regional growth to parcels.
- Two MPOs/COGs noted that they used the model UrbanSim, or a modified version of UrbanSim, for their most recent forecast.
- One used the tool Envision Tomorrow Online.

There were a range of responses to "What revisions do you make to the subregional forecast between preliminary acceptance (such as a version accepted for planning purposes) and final (such as the forecast in the adopted/approved RTP/MTP/SCS)?"

- Two respondents noted no change, although one qualified that a change might be made in the case of "large changes to local land use plans as requested by a local jurisdiction."
- Three respondents said they revise to reflect the latest data (one specified data from the California Department of Finance), local land use plans and policies, and community and stakeholder input, with two saying they also revise to reflect state policies (such as RHNA).

When reflecting on feedback from member jurisdictions, most respondents reported jurisdictions finding jobs/employment forecasts to be either reasonable or too low, while housing forecasts were seen as too high or much too high.

MPOs/COGs were also asked, "If local land use plans are insufficient to accommodate projected regional growth, how do you reconcile the two?" Given that the horizon of regional forecasts extends beyond the horizon of most general plans, MPOs/COGs had several responses.

- One noted the difference in horizon year and described an iterative process (where the forecast informs the next general plan update, and that update goes into the next forecast).
- One reported working with local jurisdictions to find areas to accommodate the difference.
- Three reported using another visioning/planning technique to accommodate the difference, with one providing examples of areas (those with high demand and low VMT) that are targeted for additional growth.

In this survey and other available plan documentation, all MPOs/COGs also described working in collaboration with local land use authorities to review and adjust plan land use scenarios.

Finally, MPOs/COGs were asked, "Please describe the process for how local (i.e., jurisdiction) input is incorporated into your regional and subregional forecasts." Respondents were unanimous that local input is considered in the subregional forecast. While the mechanisms differed—from advisory committees, to one-on-one meetings with all jurisdictions, to inviting all jurisdictions to review—all MPOs/COGs incorporated a local input and/or local review step in their subregional forecast.

Peer Practices for Alignment With RHNA

One MPO/COG responded that although not all jurisdictions were actively engaged during the development of the subregional forecast, several "became very invested in input data accuracy during RHNA." No MPO/COG explicitly mentioned using current cycle RHNA targets as a minimum threshold for future growth, though this may have occurred implicitly in some places. Informal discussions among agency staff suggest that the need to better define the relationship between the RHNA and the SCS (described in the section Alignment With RHNA, above, in the context of the SCAG region, above) are shared by other MPOs/COGs.

Peer Practices for Disseminating Subregional Data

Once a forecast is complete, MPOs/COGs use a variety of methods to make their subregional data public. Most publish the data in downloadable files on their websites. Some have interactive online tools that allow users to find forecast data for a specific location.

All publish their forecast data for their region—whether in written form as part of their plan or in a downloadable tabular format. Most MPOs/COGs also publish at the jurisdiction level.

MTC/ABAG models at the parcel level and publishes data for a variety of geographic levels, including superdistricts, a combination of TAZs that can be useful for transportation modeling. ABAG/MTC may also publish some jurisdiction- and county-level results as part of the RHNA process. They also make TAZ-level data available, but TAZ-level estimates of future households and jobs are not considered part of the final adopted plan. The data are shared with the public with a disclaimer that they are used for planning purposes only.

AMBAG and SBCAG publish jurisdiction-level data as part of their forecast. They also distribute TAZ-level data, upon request, to other local government agencies for their own planning and analysis.

SACOG produces forecasts of land use and housing at the parcel level and publishes data at the TAZ-level and other geographic areas, including regional analysis district (RAD), jurisdiction, and county levels.

SANDAG makes forecast data publicly available for a variety of pre-tabulated geographic areas, ranging from jurisdictions to census tracts. These tabulations are based on modeled data for smaller, sub-TAZ areas roughly the size of a census block, called mgras. Like AMBAG and SBCAG, SANDAG also shares small area forecast data (TAZ or mgra) with other local government agencies upon request.

When MPOs/COGs share small area data, such as TAZ-level projections, they often include caveats and disclaimers to emphasize that the data are meant for modeling purposes and not a prediction of what will occur.

Discussion

Through the course of this assessment, two themes stand out: (1) Uncertainty is an important, if undervalued, consideration in all growth forecasting, and (2) While there is no one industry standard modeling framework for subregional forecasting, engagement with local land use authorities is common practice.

This assessment suggests that most regional governments could broaden how they address forecast uncertainty. Most MPOs/COGs develop point forecasts to support their transportation plan. Few MPOs/COGs directly address uncertainty in their regional forecasts through confidence intervals or forecast ranges, and we did not find any that directly address uncertainty in their subregional forecast.

Based on survey results, it appears that there is no one method for regional forecasting that is preferred by all, or even most, large MPOs/COGs in California. Methods range from cohort-component to shift-share models to input-output models (like REMI). When considering factors to incorporate into the forecast, data-oriented trends (such as economic and demographic trends) ranked highest, policies ranked in the middle, and technological change and resource availability ranked lowest. This prioritization of forecast considerations may reflect the relative knowability of each factor. Economic and demographic trends tend to be relatively stable, while future technological change may seem relatively unknowable.

Similarly, it appears that there is no one method for subregional forecasting that is preferred by all, or even most, large MPOs/COGs in California. Some regions use probabilistic land use models like UrbanSim. Some disaggregate regional totals based on pipeline projects and general plans using in-house accounting tools or models, relying heavily on local jurisdiction input.

Despite using a wide variety of tools, all MPOs/COGs engage with local land use authorities (such as cities, counties, federal agencies, and universities) when developing their subregional forecast. It is beyond the scope of this report to assess to assess the accuracy of any particular framework. However, all frameworks likely benefit from engagement with local land use authorities in the early years of the subregional forecast, and all likely face increasing uncertainty in the later years of the forecast.

There are use cases for producing a single point forecast. Nevertheless, best practice, as described by the Transportation Research Board, is to address forecast uncertainty directly at all stages of the transportation plan—including regional and subregional forecasts. For example, such information could include forecast ranges (for the regional forecast) and multiple development scenarios (for the subregional forecast).

Regarding multiple development scenarios, many COGs do consider one or more subregional forecasts as part of their environmental impact reports. However, as noted above, PEIR scenario forecasts are often extremes that are better suited for analyzing transportation network sensitivity than reflecting a true range of anticipated future outcomes. Considering additional, less extreme, subregional forecast scenarios may help with understanding and communicating uncertainty—especially as it relates to considering the potential outcomes of policy influences such as RHNA.

In addition, because the SCS does not have to conform to existing general plans and zoning—nor do general plans and zoning need to change to reflect the SCS—the SCS introduces an additional level of uncertainty in subregional forecasts. On one hand, requirements to reduce greenhouse gas emissions may result in SCS land use assumptions that concentrate future housing in, for example, infill developments near transit. While this approach is commendable for resource conservation, infill projects have historically faced lengthy and difficult approvals processes, making their outcome far from certain even if the local land use authority puts the

necessary zoning rules into place. On the other hand, projects in the SCS are linked to California Environmental Quality Act (CEQA) streamlining opportunities. Thus, for example, a dense, transit-adjacent development being included in the SCS may increase the likelihood of development or redevelopment and thereby reduce subregional forecast uncertainty. The interplay between these forces requires further study.

In conclusion, as this report has outlined, it forecasting always involves uncertainty, but less so in stable context. The policy direction in California is arguably oriented toward changing historical trends, and this adds an additional level of uncertainty to forecasting.

MPOs/COGs should consider providing additional information about forecast uncertainty to provide decisionmakers with context. In addition, MPOs/COGs should clearly communicate the trends and policy assumptions that were incorporated into their forecast(s) so that end users can understand whether or not a forecast is suited to their needs.

Transportation Committee Agenda Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Regional Update
July to Sept	✓ Draft Goals and Performance Measures ✓ Draft 2023 FTIP/Proposed Final Draft Amendment No. 2 to Connect SoCal 2020 ✓ Connect SoCal 2024 Project List Solicitation Process ✓ NHS Infrastructure/System Performance Report ~~• Regional Dedicated Transit Lanes Final Report~~ ~~• CHSRA Status Update on Los Angeles-Anaheim Corridor~~ ✓ Southern California Goods Movement Communities Opportunity Assessment: Findings and Tools ✓ Curb Space Management Study Final Report	✓ Go Human Mini-Grants Award Announcement ✓ REAP 2.0 CTC Partnership Program Final Guidelines and Call for Projects ✓ Future Communities Pilot Program Update: Pilot Progress and Completed Pilot Findings	✓ TC 12-month lookahead
Oct to Dec	✓ Proposed Final 2023 FTIP and Proposed Final Draft Amendment No. 2 to Connect SoCal 2020 ~~• TDM Data Standards Final Report~~ ✓ Draft Connect SoCal 2024 Core (Baseline) Revenues ~~• Draft Connect SoCal 2024 Core (Baseline) Costs~~ ~~• Moving toward Universal Basic Mobility (UBM)~~ ~~• Final Performance Measures and Monitoring~~ ~~• Core Strategies: System Preservation/Management~~ ~~• Exploring Transportation Pricing & Incentives Via Mobility Wallet: MPO/Caltrans Study Overview~~ ✓ Replacing California's Gas Tax: Road Charge Research ~~• Local Data Exchange (LDX) Process Update~~	✓ Office of Traffic Safety Acceptance of Funds *(upon award)* ✓ Go Human Program Overview ✓ Go Human Mini-Grants Outcomes and Program Recap and New Strategies	✓ 2022 Trade Corridor Enhancement Program (TCEP) Project Nominations for SCAG Region for Submittal to the California Transportation Commission

EAC Strategic Work Plan Committee Outlooks--January 2023 Update

Transportation Committee Agenda Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Regional Update
Jan	~~• Draft Connect SoCal 2024 Plan Costs~~ • Draft Connect SoCal 2020 Amendment No. 3 and Draft FTIP Consistency Amendment 23-03 • Regional Dedicated Transit Lanes Final Report • Core Strategies: Transit ~~• Focus on Transit & Emerging Shared Mobility Ecosystems~~ *(merged with transit item above)* • California Integrated Travel Project (Cal-ITP) Overview	~~• REAP 2.0 CTC Partnership Program Project Selection~~ • SCAG's Draft Digital Action Plan (Release for Public Comment)	
Feb	• Draft Connect SoCal 2024 Core Revenues & Costs • Exploring Transportation Pricing and Incentives Via Mobility Wallet • Core Strategies: Complete Streets/AT; Complete Streets Policy • TDM Data Standards Final Report		
March	• Joint Policy Committee (No Regular Committees): Connect SoCal 2024 Subcommittee Recommendations		
April	• Draft Connect SoCal 2024 New Funding Strategies • Core Strategies: Goods Movement • Proposed Final Connect SoCal 2020 Amendment No. 3 and Draft FTIP Consistency Amendment 23-03	• REAP 2.0 CTC Program Project Selection & RPI Program Framework • STBG/CMAQ Program Guidelines • SCAG's Digital Action Plan	• ATP Cycle 6 Regional Program Adoption
June	• Draft Connect SoCal 2024 Policy Framework • Draft Connect SoCal 2024 Financial Plan		

Attachment: EAC Strategic Work Plan Committee Outlooks--January 2023 Update (2022-2023 Executive Administration Committee Strategic

CEHD Committee Agenda Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Regional Update
July to Sept	✓ Draft Goals and Performance Measures ✓ Local Data Exchange (LDX) and Local Information Services Team (LIST) Status Update	✓ REAP 1.0 Program Bi-Annual Status report ✓ REAP 2.0 Draft Subregional Partnership Guidelines ✓ REAP 2.0 Draft PATH Program ✓ Panel on HQTA Projects	✓ SCAG's Role in Economic Development ~~• RHNA Reform Draft Recommendations to HCD~~ (process delayed by HCD) ✓ CEHD 12-Month Lookahead
Feb	✓ Final Performance Measures and Monitoring ✓ LDX and LIST Status Update	✓ Call for Collaboration Panel ~~• Housing Trust Fund Panel (REAP 2 Development)~~ ✓ REAP 2.0 – Adoption of PATH Program ✓ Vienna Social Housing Field Study – Summary Report ~~• REAP 1.0 HSD Program Summary Report~~ (projects have not progressed enough for a meaningful report)	~~• RHNA Reform Final Recommendations to HCD~~ (process delayed by HCD) ✓ Neighborhood Mobility Areas

EAC Strategic Work Plan Committee Outlooks--January 2023 Update

CEHD Committee Agenda Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Regional Update
Jan	• LDX Update – First Look at Results • Land Use Strategies Overview	• REAP 1.0 - Bi-Annual Progress Report ~~• EIFD Program – Summary Panel~~ (moved to June – financing strategies)	~~• Final RHNA Reform Recommendations~~ timeline pushed by the State

Feb	• Land use Strategy Panels #2-3:
	  • 15-Minute Communities
	  • HPLA Presentations on Surplus and Underutilized Lands
		• REAP 1.0 - HPLA Participants Panel
		• REAP 2.0 Program Development Progress Report
		  • Final Applications/Release NOFA and HIPP Pilot	

March	• Joint Policy Committee (No Regular Committees): Connect SoCal 2024 Subcommittee Recommendations		
Apr	• Land Use Strategy Panel #3: Anti-displacement Strategies • Forecasted Regional Development Pattern – Update		• Inclusive Economic Growth - Progress Update • SoCal Economic Trends Tool

June	• Land Use Strategy Panel #4-5
	  • Job Centers, Open Space, Mobility
	  • Financing Strategies
	• Forecasted Regional Development Pattern – Input Assessment and Recs
		• REAP 1.0 Panel on Financing Strategies *(also for land use strategies)*	

July	• Utility Investments to Support Housing (Industry Forum findings) ~~• Approval of Forecasted Regional Development Pattern (SB375)~~ • Connect SoCal Policy Framework	• REAP 2.0: Final Application and Release Pilot #2 – RUSH	• Inclusive Economic Growth Progress Report

Attachment: EAC Strategic Work Plan Committee Outlooks--January 2023 Update (2022-2023 Executive Administration Committee Strategic

EEC Committee Agenda Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Regional Update
July to Sept	✓ Draft Goals and Performance Measures ✓ Equity Analysis Update—Performance Measures ✓ Transportation Conformity Challenges ✓ Planning Context: Water Resilience ✓ Green Region Resource Areas • ~~Regional Resilience Framework~~ (Moved to Subcommittee) ✓ Connect SoCal 2024 PEIR: CEQA Documentation Initiation • Final 2022 Air Quality Management Plan Appendix IV-C RTP/SCS and Transportation Control Measures (Moved to January: Receive and File) ✓ Transportation Conformity Analyses of Proposed Final 2023 FTIP, Proposed Final 2020 Connect SoCal Amendment #2	• ~~Sustainable Communities Program: Civic Engagement, Equity, and EJ Projects: Approve Final Guidelines~~ (Moved to January)	• ~~Scoping Plan~~ (Moved to February) • ~~SB 150 Report~~ (Moved to February) ✓ Climate Emergency Resolution Quarterly Update ✓ Racial Equity Baseline Conditions Report: 2022 ✓ EEC 12-month lookahead
Oct to Dec	✓ Planning Context: Energy ✓ Planning Context: Natural & Working Lands ✓ Li Battery Recycling Group Report Overview • ~~Planning Context: Brownfields~~ (Moved to February) ✓ Request to Release Connect SoCal 2024 PEIR Notice of Preparation ✓ Local Data Exchange (LDX) Update • ~~Transportation Conformity Analyses of Draft 2023 FTIP Modeling Amendment and Draft 2020 Connect SoCal Amendment #3~~ (Moved to January)	• ~~Regional Advance Mitigation Planning White Paper and Policy Framework~~ (Moved to January)	✓ Climate Emergency Resolution Quarterly Update

EAC Strategic Work Plan Committee Outlooks--January 2023 Update

EEC Committee Agenda Outlook* for FY 2023

**Anticipated major actions and information items. Does not include all Receive/File and Program Updates.*

Date	Connect SoCal	Local Assistance Program	Regional Update
Jan	• Transportation Conformity Analyses of Draft 2023 FTIP Modeling Amendment and Draft 2020 Connect SoCal Amendment #3 • ~~Planning Context: Climate Adaptation & Resilience~~ (Moved to Subcommittee report back March JPC) • ~~Strategies for Clean Transportation Technologies~~ (Policy to be recommended by ETC report back April)	• Regional Advance Mitigation Planning White Paper and Policy Framework • Sustainable Communities Program: Civic Engagement, Equity, and Environmental Justice Projects: Approve Final Guidelines	• Climate Emergency Resolution Quarterly Update • Final 2022 Air Quality Management Plan Appendix IV-C RTP/SCS and Transportation Control Measures (Presentation at RC) • Scoping Plan
Feb	• Planning Context: Brownfields • Sustainable Communities Strategy Technical Methodology Submittal to CARB	• REAP 2.0 Program Development Progress Report	
March (JPC)	• Joint Policy Committee (No Regular Committees): Connect SoCal 2024 Subcommittee Recommendations (Action)		
April	• Equity Analysis Update • PEIR Mitigation Measures • PEIR Alternatives Update	• REAP 2.0 Program Development Progress Report • Electric Vehicle Planning Study: Final Report	• Water Resolution Update • Sustainable Development and Water–Drought Tolerant Landscaping; Ground Water Infiltration
June	• Forecasted Development Pattern-Input Assessment and Recommendations • Strategies for Land-Use: Natural and Farmland Conservation (Carbon Sequestration Speaker) • Strategies Climate Adaptation and Resilience		
July	• Strategies for Land-Use: Housing Support Infrastructure (Water & Energy) • Connect SoCal 2024 Policy Framework		

Other Items To Be Scheduled:
- Sustainable Communities Program: Civic Engagement, Equity, and EJ Projects: Approve Projects

Attachment: EAC Strategic Work Plan Committee Outlooks--January 2023 Update (2022-2023 Executive Administration Committee Strategic

Regional Council Agenda *Policy* Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Regional Policy/Connect SoCal	Local Assistance Program	Business/ Regional Update
Sept	✓ Digital Equity—Affordable Connectivity Program Call for Action (Action)	✓ REAP 2.0: Subregional Partnership Program Guidelines (Action)	
Oct	✓ EAC Strategic Plan (Action) ✓ Water Resilience (Action) ✓ Proposed Final 2023 FTIP and Proposed Final Draft Amendment No. 2 to the 2020 Connect SoCal (Action/Consent)	✓ ATP Augmentation (Action)	
Nov	~~• Supply Chain—Call to Action~~ ✓ TCEP Regional Project List (Action)	✓ REAP 2.0: Sustainable Communities Program (SCP) Call 4 Guidelines (Action) ✓ REAP 2.0: CTC Partnership Program & Call for Projects (Action)	
Dec (EAC on behalf of RC)		✓ REAP 2.0: Authorization to Apply for Full Funding (Action)	

EAC Strategic Work Plan Committee Outlooks--January 2023 Update

Regional Council Agenda *Policy* Outlook for FY 2023

Anticipated major actions and information items. Does not include all Receive/File and Program Updates.

Date	Connect SoCal	Local Assistance Program	Business/Regional Updates
Jan	• ~~Lithium/Salton Sea (Information Item)~~ Moved to Emerging Technology Committee	• Sustainable Communities Program: Civic Engagement, Equity, and Environmental Justice Projects: Approve Final Guidelines (Action) • 2023 Go Human Community Hubs Program Guidelines: Approve Guidelines (Action)	• Air Quality Management Plan • Release of the Draft 2020 Connect SoCal Amendment No. 3 and Draft FTIP Consistency Amendment 23-03 (Action)
Feb		• Regional Advance Mitigation Planning White Paper and Policy Framework (Action)	• STBG/CMAQ Compliance Action Plan (Action)
March	• Supply Chain Panel & Call to Action Resolution		• FY 23-24 Overall Work Plan & Budget
April	• Connect SoCal Subcommittee Recommendations (Action) • Emerging Technology Committee Recommendation—Clean Transportation Technology (Action)	• SCAG's Digital Action Plan (Action)	• STBG/CMAQ Program Guidelines (Action) • Consideration of Proposed Amendments to SCAG's Bylaws (and possibly amendments to the Regional Council Policy Manual) • Nominations and Elections of 2023-23 SCAG Officers

Other Items To Be Scheduled Pending Committee Action:
- Connect SoCal Policy Framework
- REAP 2.0 CTC Program Project Selection (May/June)
- REAP 2.0 Regional Pilot Initiative Framework (May/June)

Attachment: EAC Strategic Work Plan Committee Outlooks--January 2023 Update (2022-2023 Executive Administration Committee Strategic

AGENDA ITEM # 6 LEGISLATIVE UPDATE

STAFF RECOMMENDATION

That the OCCOG Board of Directors:

1) Adopt the 2023-2024 Legislative Policy Guidelines
2) Approve the formation of an Ad Hoc Legislative Committee to consider developing proposals that could be considered as an OCCOG sponsor bill and review available resources for such an effort.

SUMMARY

The Legislative Update is provided to keep the OCCOG Board apprised of legislative and regulatory actions that address land use and housing, energy, mobility, air quality and water issues. This report provides an overview of 2021 chaptered legislation of interest and the disposition of bills where the OCCOG Board of Directors took a position.

BACKGROUND

State Update

January Budget Proposal

The Governor released the January Budget Proposal on January 10, 2023. The $297 billion proposed budget includes a $22.5 billion deficit that is proposed to be closed using a series of actions to borrow funds and delay spending until future years rather than relying on the use of budget reserve accounts. This projected deficit does not include considerations of a potential recession, though the narrative does note that a draw down of reserves could be needed if economic conditions deteriorate.

The January Budget Proposal includes $35.6 billion in total reserves, including $22.4 billion in the Budget Stabilization Account (BSA), $8.5 billion in the Public School System Stabilization Account, $900 million in the Safety Net Reserve, and $3.8 billion in the state's operating reserve. With the BSA at its constitutional maximum amount, $951 million is required to be used for infrastructure investments in FY 2023-2024.

To close the $22.5 billion projected deficit, the Governor proposes the following measures:

- Funding Delays - $7.4 billion

- Delays funding for various items to future fiscal years
- Reductions/Pullbacks - $5.7 billion
  - Reductions to various projected spending items including:
    - $3 billion inflationary adjustment
    - $750 million Unemployment Trust Fund payment
- Fund Shifts - $4.3 billion
  - Shifts funding allocated from the General Fund from current and next year to other funds:
    - Various California State University (CSU) Capital Outlay Projects to be funded by issued debt
    - Reverting certain bonds from cash back to bonds
    - Shifting Zero Emission Vehicle (ZEV) commitments to the Greenhouse Gas Reduction Fund (GGRF)
- Trigger Reductions - $3.9 billion
  - The following reductions are included in the proposed budget, but they would be "triggered" to being restored if sufficient funds are available:
    - Climate and Transportation - $3.1 billion
    - Housing - $600 million
    - Parks - $106 million
    - Workforce Training - $55 million
- Limited Revenue Borrowing - $1.2 billion
  - To augment General Fund resources, loans from special funds are proposed as well as the renewal of the Managed Care Organization Tax.

In addition, resiliency measures for future fiscal years are proposed including delayed issuance of bonds and reduced contributions to reserve accounts. Key budget proposals surrounding OCCOG's areas of interest are further described below.

<u>Climate and Transportation</u>

For the first time, the Governor's proposal combines investments in transportation and climate into one chapter rather than allocating a chapter to each category, reflecting an increasing link between the two at the state level as they cite the role of transportation in the climate discussion.

- ZEV Acceleration
  - 89% of the $10 billion commitment over five years is proposed to be maintained. Cuts from the program include:
    - $2.5 billion across various ZEV programs, partially offset by $1.4 million from the GGRF

        - Funding from the Inflation Reduction Act for clean energy programs will be pursued to further fill the gap, in addition to directing a higher level of discretionary Cap and Trade proceeds to these programs
- Transportation
    - $2.7 billion in General Fund reductions, partially offset by $500 million from the Infrastructure Investment and Jobs Act (IIJA) that was allocated to the State Highway Account (SHA) in the following areas:
        - Transit & Intercity Rail Capital Program - $1 billion implemented proportionally by region
        - Active Transportation Account - $500 million reduction offset by $300 million from the SHA
        - Climate Adaptation Program - $200 million reduction offset by $200 million from the SHA
        - Safety Grade Separations - $350 million delayed to FY 2025-2026
    - No additional funding is proposed to help transit agencies address shortfalls
- Drought Response and Water Resilience
    - New Investments proposed include:
        - $135.5 million Urban Flood Risk Reduction
        - $125 million Drought Contingency
        - $4.7 million for planning and permitting new water supplies
        - $7 million for water conservation and drought planning
    - Proposed reductions include:
        - Delay of funding for Community Resilience Centers to FY 2024-2025
        - $125 million reduction over two years for Regional Climate Resilience
        - $105 million reduction over two years for the Transformative Climate Communities
        - $472 million reduction over two years for Coastal Protection and Adaptation

<u>Housing and Homelessness</u>

- Community Assistance, Recovery and Empowerment (CARE) Court allocations include:
    - $88.3 million for county start up and state implementation costs
    - $191.5 million over three years for county behavioral health department costs
- $3.4 billion to maintain state homelessness related funding commitments including $400 million for a third round of encampment resolution grants and $1 billion for a fifth round of Homelessness Housing, Assistance and Prevention (HHAP) grants.
- Proposed reductions in this category include:
    - $200 million reduction to Dream for All
    - $100 million reduction to CalHome

- Current year reduction of $50 million to the Accessory Dwelling Unit program
- The Administration proposes to condition eligibility for future homeless-related grants and competitive programs on compliance with state housing law. For communities that are not compliant, other overlapping jurisdictions (cities, counties, continuums of care) will receive that entities share of funds.

Legislative Policy Guidelines

In preparation for the 2023-2024 Legislative Session, the existing Legislative Policy Guidelines are proposed for updates to reflect anticipated issues for the next two-year session. The update process included assessing the legislative outlook for the coming year, conducting a review of partner agency legislative platforms, presentations to the OCCOG Technical Advisory Group and Board of Directors, and the distribution of an electronic survey through the OCCOG newsletter for feedback.

If adopted by the Board of Directors, these guidelines will guide OCCOG's activities and recommendations for the 2023-2024 legislative session, which began on December 5, 2022.

Proposed Updates

With the January Budget Proposal reflecting an estimated $22.5 billion deficit for Fiscal Year (FY) 2023-2024, the risks to local revenues are significant and efforts to redirect, redefine and delay revenues for infrastructure and local government are already being proposed. In addition, housing is also expected to continue to be a key topic and we are already seeing bills that will have new impacts on local land use authority.

The intersection of transportation and state climate policy will also continue to be a key topic, with capacity projects becoming increasingly difficult to advance. Bills that were proposed in 2022 along these lines have already been reintroduced for this next two-year session. Lastly, the updated legislative policy guidelines are proposed to reflect regional conversations on the desire to rebalance the relationship between local agencies and the state to reflect more of a partnership approach that respects the expertise and needs of local agencies as well.

The proposed changes to the Legislative Policy Guidelines reflect the overall outlook for the coming session including:

Budget and Revenue

Funding

- Oppose efforts to balance the State Budget using general or special fund revenues traditionally allocated to local or regional entities.

- Oppose efforts to borrow from, redirect, eliminate, or shift locally generated revenues for other purposes.
- Oppose any attempts to borrow, redirect, shift or otherwise use state or federal funding currently dedicated for local agencies to meet housing, transportation, water, or energy needs without specific repayment terms and repayment of all previously borrowed funds.

Transportation

- Support the protection of all existing and new transportation funding sources from the imposition of new conditions on the distribution of funds that reprioritize transportation projects.

State-Local Relationship

Governance

- Support improved partnerships with the State that value the expertise, needs, and priorities of local government and the many unique communities throughout the state.

Housing

- Support greater flexibility for local housing element updates and improved partnerships with HCD to help address housing needs and shared housing goals/priorities.

Anticipated Policy Proposals

Transportation

- Oppose efforts to reduce or eliminate local control over priority setting or project selection for locally generated sales tax revenues for transportation.

Housing

- Support providing local jurisdictions with additional tools and funding while preserving local authority to address housing production, affordability, and homelessness challenges.
- Support maintaining maximum local authority over housing and land use decisions throughout the CEQA process.

Other

Brown Act

- Support legislative efforts to modernize the Ralph M. Brown Act to increase public participation, keep up with emerging technology, and allow local government agencies flexibility in conducting official meetings through virtual format.

Environment

- Support transparency in and the equitable distribution of Greenhouse Gas Reduction Fund (GGRF) resources commensurate with the region's responsibility in meeting the state's overall greenhouse gas (GHG) reduction goals.
- Support CEQA streamlining efforts to help local agencies meet housing, transportation, and other environmental goals.
- Support maintaining or increasing Cap and Trade revenues that are allocated to local agencies and improved flexibility in the use of funds.

Guiding Principles

OCCOG's Legislative Advocacy Process will also continue to reflect the following guiding principles for recommendations and advocacy efforts:

- OCCOG will seek to reach consensus among member jurisdictions and ex-officio partners on legislation prior to taking a position.
- OCCOG will avoid taking a position on legislation that divides rather than unites our members.
- OCCOG staff is authorized to continue to advocate a position for a bill which has been amended into a new bill number as long as the legislative intent and language remain substantially unchanged.
- Letters of support or opposition will be provided on OCCOG letterhead and signed by the Board Chairman unless directed by the Board to be signed by the Executive Director.
- In cases where insufficient time exists for a bill to go before the OCCOG Board of Directors, the Executive Committee may take a support or oppose position on legislation consistent with the Board adopted Legislative Policy Guidelines.

At the January Executive Committee Meeting, Board Chair Wagner suggested that an Ad Hoc Legislative Committee be established to consider developing proposals that could be considered as an OCCOG sponsor bill in the future. The proposed Ad Hoc Legislative Committee would also review available resources for a possible enhanced advocacy program.

The proposed 2023-2024 Legislative Policy Guidelines are included as Attachment A. In addition, a list of bills of interest introduced to date in the OCCOG priority areas is included as Attachment B. Staff anticipates bringing specific bills forward at the February Board Meeting for consideration.

California Air Resources Board (CARB) Scoping Plan

In December, CARB adopted the Final 2022 Scoping Plan that seeks to achieve carbon neutrality by 2045, including goals to reduce GHG emissions by 48% by 2030 and 85% by 1045, reduce smog-forming pollution by 71%, and reduce total fossil fuel consumption by 86%.

In order to achieve these targets, the plan proposes some of the following actions:

- Quadruple wind (20-gigawatt increase) and solar power (10-gigawatt increase) by 2045
- Accelerate Low Carbon Fuel Standard (LCFS) targets
- Develop infrastructure for Carbon Capture and Sequestration (CCS) technologies
- 100% light duty vehicle sales by 2030, 100% medium and heavy duty ZEV sales by 2040
- Reduction in vehicle miles traveled (VMT) of 25% by 2030 and 30% by 2045
    - This includes a shift from the base year of calculation from 2005 to 2019

The SB 150 Progress Report released by CARB in June 2022 notes that regional agencies currently lack the authority to achieve the state's climate goals and that 53 of 58 recommendations from this report will require state action to implement. The Legislative Analyst's Office (LAO) also released a report in early January that notes the State is already on track to fall short of the existing GHG reduction standard of 40% by 2030 and recommends further changes to the cap-and-trade program in order to come closer to the desired target. Together, these reports demonstrate the gap between requirements and feasibility that local and regional agencies face.

This plan is required to be updated every five years.

California Transportation Commission Regional Transportation Plan Guidelines Update

The California Transportation Commission (CTC) and California Department of Transportation (Caltrans) have invited stakeholders to participate in Work Groups to provide input on the Regional Transportation Plan (RTP) Guidelines update. These meetings will occur virtually through Fall 2023. The Work Groups will allow stakeholders to provide technical assistance and input throughout the update process, provide input on how statutory requirements and planning practice examples are addressed, and help develop key language edits and additions.

The proposed Work Group topics are:

1. Equity, Public Health, and Public Outreach
2. Housing, Environment, and Climate Change
3. Business and Economic Development
4. Freight
5. Transportation Performance Management
6. Modeling

If OCCOG members are interested in participating in any of the Work Groups, please complete the form at this link: https://app.smartsheet.com/b/form/b93de3bce2fd492996e0801d059cba04

In addition, a workshop will be held in Sacramento on February 15, 2023 on the California Transportation Plan (CTP) and Regional Transportation Plan (RTP). Interested parties may register to attend virtually here:
https://cadot.webex.com/weblink/register/r54d58639f6b14b779ec7e37194fa0196

For information about the RTP Guidelines update process visit Caltrans' webpage:
https://dot.ca.gov/programs/transportation-planning/division-of-transportation-planning/regional-and-community-planning/2023-rtp-guidelines-update

ATTACHMENTS

A. OCCOG Legislative Policy Guidelines
B. OCCOG Bills of Interest

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