



Technical Working Group

August 17, 2017

10:00 a.m. – 12 noon

SCAG Downtown Office – Board Room

818 West 7th Street, 12th Floor

Los Angeles 90017

(How to Participate in Meeting on Next Page)

AGENDA

Receive and File

July 20, 2017 TWG meeting notes

Information Items

- | | | |
|--|--------------------------|-------------|
| 1. Accessory Dwelling Units | D. Diep
CSU-Fullerton | Attachments |
| 2. Updated Guidelines and Schedule -Bottom-Up Local Input and
Envisioning Process for development of the 2020 RTP/SCS | K. Clark | Attachment |
| 3. Draft Scope of Work – Mapping Metro’s Transit Supportive Toolkit | K. Clark | Attachment |



How to Participate

In Person

SCAG Downtown Office Board Room

818 W. 7th Street, 12th Floor
Los Angeles 90017
213-236-1800

Videoconference

Orange County

OCTA Building
600 South Main Street, Suite 1233
Orange, CA 92868
Telephone: (714) 542-3687

Riverside County

3403 10th Street, Suite 805
Riverside, CA 92501
Telephone: (951) 784-1513

Imperial County

1405 N. Imperial Avenue, Suite 1
El Centro, CA 92243
Telephone: (760) 353-7800

San Bernardino County

1170 West 3rd Street, Suite 140
San Bernardino, CA 92410
Telephone: (909) 806-3556

Ventura County

950 County Square Drive, Suite 101
Ventura, CA 93003
Telephone: (805) 642-2800

Coachella Valley

73-710 Fred Waring Dr., Suite 200
Palm Desert, CA 92260
Telephone: (760) 346-1127

Web Meeting

<http://scag.adobeconnect.com/twg91814/>

Teleconference Number: 1-800-832-0736

Meeting Room# 7334636

Teleconference

Number: 1-800-832-0736 – Participant Code: 7334636



Technical Working Group

Receive and File



Technical Working Group

July 20, 2017

Meeting Summary

The following is a summary of discussions at the Technical Working Group on July 20, 2017.

Information Items

1. ATP Augmentation & SCAG Call for Projects

Stephen Patchan, SCAG staff, updated the working group on the 2017 Active Transportation Program Augmentation Guidelines and Sustainability Planning Grants. Mr. Patchan reported the adoption of Senate Bill 1 (SB1) provides an additional \$100 million a year for the California Active Transportation Program (ATP) starting fiscal year (FY) 2017-18. He noted the Guidelines maintain the program's traditional funding structure of awarding grants through three competitive components: Statewide Component, Small Urban & Rural Component and Metropolitan Planning Organization (MPO) Component. Mr. Patchan stated SCAG's share of the MPO Component is \$40 million and the funding across all three components will be awarded to the augmentation of the 2017 ATP, either through advancement of projects previously recommended for funding or to projects that were submitted and scored, but not funded. The deadline for applying to the 2017 ATP is August 1, 2017.

Mr. Patchan further noted that SCAG will re-issue the Regional 2017 Supplemental Call for Projects that will provide \$2 million for planning and non-infrastructure projects aimed at building local capacity for future ATP funding cycles. Mr. Patchan stated that the supplemental call for projects was released July 6, 2017, as the Sustainability Planning Grants: 2017 Active Transportation Call for Proposals and the deadline is August 31, 2017. Additionally, an informational workshop for potential applicants will be hosted at SCAG July 20, 2017.

2. 2020 RTP/SCS Growth Forecast – Preliminary Approaches to Project Jurisdiction Level Growth

Frank Wen update the group on preliminary approaches to jurisdiction level growth projections for the 2020 RTP/SCS. The methodology for growth forecast was reviewed. He noted preparation is underway for county level forecast and they will reflect the last plan distribution with additions from jurisdiction. City level forecasts will follow then TAZ

level projections. Local input will also be sought once disaggregated to the city level which could occur at the end of October or November.

Ying Zou continued the presentation and reviewed how county level projections are taken to the jurisdictional level. She noted population, household and employment will be projected for future milestone years. It was noted data is sourced from the census, DOF and 2016 RTP/SCS. Ms. Zou reviewed the approach for the different data categories.

3. 2016 Regional Land Use Data Development

Jung Seo updated the working group on 2016 regional land use data development. It was noted that SCAG uses a bottom up local input process for the development of the RTP/SCS and the regional land use database will be compiled accordingly. The categories were reviewed including general plan land use and existing plan land use. Further an inventory of specific land use information has been conducted. Mr. Seo updated the group on the land use codes and noted that staff will communicate to local jurisdictions throughout the process.

4. Draft Data Elements and Timeline for the 2020 RTP/SCS Bottom-Up Local Input Process of the 2020 RTP/SCS

Kimberly Clark updated the working group on bottom up local input process for the 2020 RTP/SCS. It was noted the bottom up local input process will begin late October 2017 to establish the base land use, socioeconomic and resource area data sets for the 2020 RTP/SCS. She noted the process will involve a great deal of coordination and outreach for the 197 local jurisdictions and 15 subregions. October will be used to engage the subregions through planning directors meetings and one on one meetings will likely begin November 2017. Additionally, trainings for the SBM data management site will be key in the refinement of data. Ms. Clark noted that the interactive SBM site will be available so locals can view and edit data. Training will likely occur in September and October.

5. 2020 RTP/SCS Local Input Survey

Roland Ok provided an update on the 2020 RTP/SCS local input survey. It was noted as part of the 2020 RTP/SCS, SCAG has developed a local input survey to collect information from local jurisdictions. It was noted the survey was built upon the one developed in the 2016 RTP/SCS with improvements that add more substantive questions. Additionally, new questions have been added on housing, goods movement, public safety, public health, environmental justice and others. Mr. Ok noted the survey will assist in scenario development for the RTP/SCS and the PEIR. It is felt the survey will help provide better customer assistance to local jurisdictions. Additionally a glossary will be provided.

6. MAP-21 Performance Measures Status Overview

Ping Chang updated the TWG on MAP-21 performance measures status overview. It was noted that in the past years the U.S Department of Transportation has been undergoing rulemaking to establish those performance measure. It was noted a significant portion of the performance measures became effective at the end of May 2017. Additionally, there is a requirement to establish targets at both the state and MPO level. Mr. Chang noted

that SCAG is currently responding to the performance measurement requirements internally and there will be continued updates to the TWG.

7. SB 743 Update

Ping Chang updated the TWG on SB 743 and noted the rulemaking process continues. Mr. Chang noted a stakeholders workshop will be held in northern California and working group members are welcome to attend it. Mr. Chang reviewed possible mitigation and VMT strategies under consideration and noted that he will continue to update the working group as the process continues.



Technical Working Group

Agenda Item 1

Accessory Dwelling Units (ADU)



28th Annual USC/SCAG Demographic Workshop
Roundtable Discussion, June 26, 2017

Updated for SCAG TWG August 17, 2017

What's New?

- 4 pieces of legislation passed in 2016
 - Effective January 1, 2017
 - Encourage additional rental housing (cannot be sold separately from primary housing unit)
 - Streamline approval processes & setting form standards
 - Renders null and void local ordinances if they have not been updated; i.e. ADUs are allowed anywhere there is a single family home unless ordinance is updated.
 - Pending clean up legislation – SB 229 & AB 494
- Accessory Dwelling Units (ADUs)- a.k.a. second units, granny flats, in-law units, casitas...
 - Two types: ADU & JADU (junior accessory dwelling unit)
 - Four forms: detached ADU; attached ADU; and repurposed space ADU & JADU

Table 1

REQUIREMENTS	ADU- Detached (ADU-D)	ADU- Attached (ADU-A)	ADU- Attached; repurposing of existing space (ADU-R)	JADU- Attached; repurposing of existing space (JADU)
Activity Type	New construction	New construction; addition to existing structure	Conversion; conversion of existing space	Conversion; conversion of existing space
Lot/existing structure	Single family residence on SF or MF lot	Single family residence on SF or MF lot	Single family residence on SF or MF lot	Must be within existing SF residence on SF zoned lot
Maximum ADU Size	1,200 square feet	50% of living area up to 1,200 square feet	No size limits	500 square foot maximum
Kitchen	Required	Required	Required	Required: efficiency kitchen
Bathroom	Required	Required	Required	Not required; shared bath with primary residence is allowed
Separate Entrance	Jurisdiction may require	Jurisdiction may require	Required	Required
Parking	Depends, parking may be eliminated and cannot be required under specified conditions	Depends, parking may be eliminated and cannot be required under specified conditions	No, parking cannot be required	No, parking cannot be required
Prohibition on ADU Sale	Yes	Yes	Yes	Yes
Ministerial Approval Process	Yes	Yes	Yes	Yes

U.S. Census Bureau Housing Unit Definitions

Single family-detached unit	A one-unit structure with open space on all four sides. The unit often possesses an attached garage.
Single family-attached unit	A one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. Each must be separated from the adjacent unit by a ground-to-roof wall in order to be classified as a single-family structure. Also, these units must not share heating/air-conditioning systems or utilities, such as water supply, power supply, or sewage disposal lines.
Mobile/Manufactured home unit	A manufactured home is defined as a movable dwelling, 8 feet or more wide and 40 feet or more long, designed to be towed on its own chassis, with transportation gear integral to the unit when it leaves the factory, and without need of a permanent foundation. These homes are built in accordance with the U.S. Department of Housing and Urban Development (HUD) building code.
Multifamily units	Residential buildings containing units built one on top of another and those built side-by-side which do not have a ground-to-roof wall and/or have common facilities (i.e., attic, basement, heating plant, plumbing, etc.) Multifamily structures are classified by the number of housing units in the structure. Data are tabulated for 2 units, 3 and 4 units combined, and 5 or more unit structures.
Unconventional	Boat, RV, van, tent, etc.; if someone lives in the structure permanently and doesn't have a permanent residence elsewhere.

U.S. Census Bureau LUCA

- Local Update of Census Addresses program
- Provides a voluntary opportunity for designated representatives of tribal, state and local governments to review and comment on the addresses used to conduct the decennial census
- Strict confidentiality and security guidelines through Title 13
- Timeline
 - July 2017- Register to participate (deadline December 15, 2017)
 - Fall/Winter 2017- Attend training workshops
 - Feb-April 2018- Conduct LUCA review
- <https://www.census.gov/geo/partnerships/luca.html>
- California has budgeted monies to reimburse local agencies who participate in the LUCA program
 - http://www.dof.ca.gov/forecasting/demographics/2020_census/

DOF Housing Unit Definitions

Single-detached unit	A one-unit structure with open space on all four sides. The unit often possesses an attached garage.
Single-attached unit	A one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. The shared wall or walls extend from the foundation to the roof with adjoining units to form a property line. Each unit has individual heating and plumbing systems.
Mobile home unit	A one-unit structure that was originally constructed to be towed on its own chassis.
2-, 3-, and 4-plex units per structure	A structure containing two, three, or four units and not classified as single-unit attached structure. The units in the structure share attic space and heating and plumbing systems.
5 or more units per structure	A structure containing five or more housing units. The units share attic space, and heating and plumbing systems.
Affordable Units	Any unit with a legally enforceable agreement for at least 30 years that restricts occupancy and requires affordable housing costs (Health and Safety Code section 50052.5) or affordable rent (Health and Safety Code section 50053) be provided to person(s) whose household income qualifies as extremely-low, very-low, low, or moderate income. Legally enforceable agreements may include deed-restrictions recorded by the local County Recorder or affordability restrictions enforceable by a public agency (e.g. local inclusionary ordinances or density bonus units).

DOF Annual Housing Unit Survey

- Annual tracking of jurisdiction-level housing unit activity through Housing Change Form
 - Part of DOF's annual subcounty/county population estimates program
 - Survey of all 482 cities and 58 counties in California
 - new construction
 - conversions
 - demolitions
- ADU classification for DOF form
 - DOF follows the same definitions of housing structure types as the U.S. Census Bureau American Community Survey (ACS).
 - The DOF form can't change any classification without Census first changing the categories measured in the ACS due to the benchmarking of our population estimates program on the decennial census.

Scenario 1

+ ADU = Converting Existing Housing Type



Start with: 4 townhomes
(single family attached-
SFA) on single family (SF)
lots

Add ADU: Convert
existing bedroom/bath
into ADU

Scenario 1

+ ADU = Converting Existing Housing Type



Units with shared attic space & plumbing are defined as multi family housing units

Activity:
Convert 1 SFA into 2 MF

Result:
3 SFA & 2 MF on SF lots

SFA- single family attached
MF- multi family

Scenario 1 Alternative + ADU to primary unit



Why not track ADUs separately?

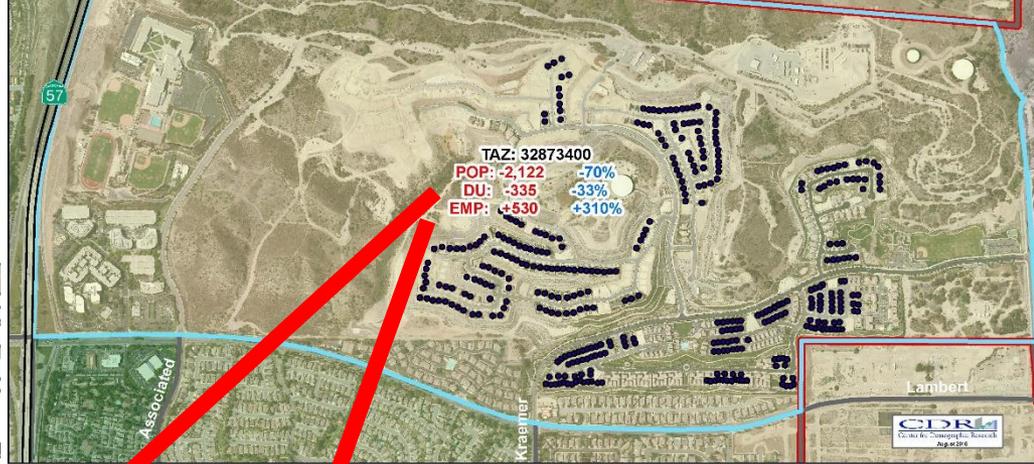
Separate rental unit from owner unit and retain primary unit type/usage and add accessory unit

Why not retain existing unit's primary status and have result be 4 SFA & 1 ADU?

Scenario 2

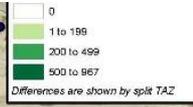
- City X
- 2,000 housing units from American Community Survey (ACS)
 - All residential lots zoned single-family
 - No townhomes, apartments or multi-plex units in the city
 - 1,975 single family detached (SFD)
 - 25 attached accessory units = 25 single family attached (SFA)
- New ADU law and strict definitions would characterize these as multi-family structures & change housing stock to:
 - 1,950 single family detached
 - 50 multi-family with 2-4 units in structure; creates legal, non-conforming units

Scenario 3

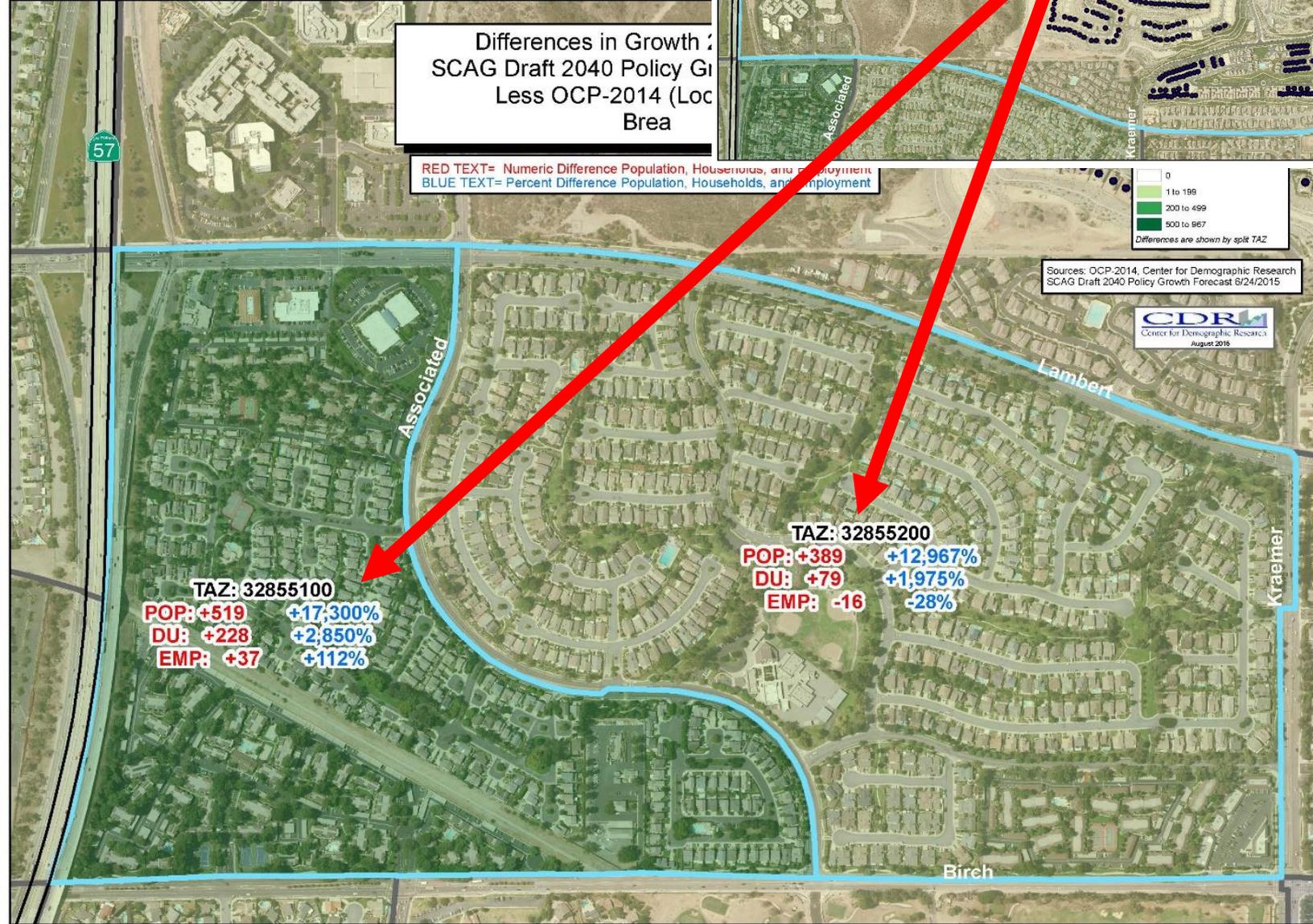


Differences in Growth 2
 SCAG Draft 2040 Policy Gr
 Less OCP-2014 (Loc
 Brea

RED TEXT= Numeric Difference Population, Households, and Employment
 BLUE TEXT= Percent Difference Population, Households, and Employment



Sources: OCP-2014, Center for Demographic Research
 SCAG Draft 2040 Policy Growth Forecast 6/24/2015



Questions/Issues

- Artificial change in the makeup of a jurisdiction's housing stock if SF units are reclassified as MF
- Reclassifying SF units as MF will affect traffic modeling and household sizes
- These are accessory units by definition. Shouldn't the primary use of the lot and structure be retained and then separately track ADUs?
- Doesn't reclassification of SF to MF create a legal, non-conforming unit (i.e. multifamily on SF lot)? Isn't this in conflict with the legislation when it talks about consistency with general plan and zoning designations for lots?
- Will ADUs really create more housing stock or is this an artificial increase in units, except when new detached structure is added?
- What will the effect of ADUs be on things such as utilities, parking, schools, emergency response...?
- Can HOAs/CC&Rs prohibit ADUs?
- LUCA will be key in helping to identify ADUs.

Questions/Issues *(continued)*

- Census will count ADUs even if they aren't permitted
 - It is best to have unique address identifier for ADUs- different #, A/B unit ½
 - Census housing units are self-reported, so describing unit type isn't consistent
 - There is no formal process for “removing” an ADU from the housing stock if not in use or if new homeowner doesn't use the ADU or absorbs it back into original structure. If there is no response during the Decennial Census, they may not count the ADU as a separate unit and unit would “go away”.
- There is no consistent numbering/addressing standards for ADU units across jurisdictions, and sometimes within jurisdictions. Agencies would prefer a consistent identifier process.
- There was recognition by all agencies that the technical/definitional conversion of SF units to MF units by adding an ADU to a SF structure may cause down-the-line issues such as changing the character of a jurisdiction by creating legal non-conforming units, changing the nature of a jurisdiction's housing mix, and traffic modeling results.

Accessory Dwelling Unit (ADU) Reference Info

- <http://www.leginfo.ca.gov/NewLaws.html>
 - SB 1069 (2016)
 - AB 2299 (2016)
 - AB 2406 (2016)
 - AB 2501 (2016)
- CA HCD ADU website
<http://www.hcd.ca.gov/policy-research/AccessoryDwellingUnits.shtml>
- CA HCD ADU Technical Assistance Booklet
<http://www.hcd.ca.gov/policy-research/docs/17Jan30-ADU-TA-Memo.pdf>
- CA Dept. of Finance (DOF) Housing Unit Change form & instructions
http://www.dof.ca.gov/Forecasting/Demographics/Housing_Unit_Survey/
- U.S. Census Bureau Housing Unit Definitions
<https://www.census.gov/construction/chars/definitions/>
- U.S. Census Bureau Local Update of Census Addresses Program (LUCA)
<https://www.census.gov/geo/partnerships/luca.html>

Contacts

John Boyne
CA Department of Finance
John.boyne@dof.ca.gov
(916) 327-0103 x2539

Tim McMonagle
Los Angeles Regional Office
U.S. Census Bureau
timothy.william.mcmonagle@census.gov
(818) 267-1730

Paul McDougall
CA Housing and Community Development
Paul.McDougall@hcd.ca.gov
(916) 263-7420

Deborah Diep
Center for Demographic Research
Cal State Fullerton
ddiep@fullerton.edu
(657) 278-4596

Accessory Dwelling Units (ADU)

28th Annual USC/SCAG Demographic Workshop
Roundtable Discussion, June 26, 2017

Updated for SCAG TWG August 17, 2017

1

What's New?

- 4 pieces of legislation passed in 2016
 - Effective January 1, 2017
 - Encourage additional rental housing (cannot be sold separately from primary housing unit)
 - Streamline approval processes & setting form standards
 - Renders null and void local ordinances if they have not been updated; i.e. ADUs are allowed anywhere there is a single family home unless ordinance is updated.
 - Pending clean up legislation – SB 229 & AB 494
- Accessory Dwelling Units (ADUs)- a.k.a. second units, granny flats, in-law units, casitas...
 - Two types: ADU & JADU (junior accessory dwelling unit)
 - Four forms: detached ADU; attached ADU; and repurposed space ADU & JADU

2

Table 1

REQUIREMENTS	ADU- Detached (ADU-D)	ADU- Attached (ADU-A)	ADU- Attached; repurposing of existing space (ADU-R)	JADU- Attached; repurposing of existing space (JADU)
Activity Type	New construction	New construction; addition to existing structure	Conversion; conversion of existing space	Conversion; conversion of existing space
Lot/existing structure	Single family residence on SF or MF lot	Single family residence on SF or MF lot	Single family residence on SF or MF lot	Must be within existing SF residence on SF zoned lot
Maximum ADU Size	1,200 square feet	50% of living area up to 1,200 square feet	No size limits	500 square foot maximum
Kitchen	Required	Required	Required	Required: efficiency kitchen
Bathroom	Required	Required	Required	Not required; shared bath with primary residence is allowed
Separate Entrance	Jurisdiction may require	Jurisdiction may require	Required	Required
Parking	Depends, parking may be eliminated and cannot be required under specified conditions	Depends, parking may be eliminated and cannot be required under specified conditions	No, parking cannot be required	No, parking cannot be required
Prohibition on ADU Sale	Yes	Yes	Yes	Yes
Ministerial Approval Process	Yes	Yes	Yes	Yes

U.S. Census Bureau Housing Unit Definitions

Single family-detached unit	A one-unit structure with open space on all four sides. The unit often possesses an attached garage.
Single family-attached unit	A one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. Each must be separated from the adjacent unit by a ground-to-roof wall in order to be classified as a single-family structure. Also, these units must not share heating/air-conditioning systems or utilities, such as water supply, power supply, or sewage disposal lines.
Mobile/Manufactured home unit	A manufactured home is defined as a movable dwelling, 8 feet or more wide and 40 feet or more long, designed to be towed on its own chassis, with transportation gear integral to the unit when it leaves the factory, and without need of a permanent foundation. These homes are built in accordance with the U.S. Department of Housing and Urban Development (HUD) building code.
Multifamily units	Residential buildings containing units built one on top of another and those built side-by-side which do not have a ground-to-roof wall and/or have common facilities (i.e., attic, basement, heating plant, plumbing, etc.) Multifamily structures are classified by the number of housing units in the structure. Data are tabulated for 2 units, 3 and 4 units combined, and 5 or more unit structures.
Unconventional	Boat, RV, van, tent, etc.; if someone lives in the structure permanently and doesn't have a permanent residence elsewhere.

U.S. Census Bureau LUCA

- Local Update of Census Addresses program
- Provides a voluntary opportunity for designated representatives of tribal, state and local governments to review and comment on the addresses used to conduct the decennial census
- Strict confidentiality and security guidelines through Title 13
- Timeline
 - July 2017- Register to participate (deadline December 15, 2017)
 - Fall/Winter 2017- Attend training workshops
 - Feb-April 2018- Conduct LUCA review
- <https://www.census.gov/geo/partnerships/luca.html>
- California has budgeted monies to reimburse local agencies who participate in the LUCA program
 - http://www.dof.ca.gov/forecasting/demographics/2020_census/

DOF Housing Unit Definitions

Single-detached unit	A one-unit structure with open space on all four sides. The unit often possesses an attached garage.
Single-attached unit	A one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. The shared wall or walls extend from the foundation to the roof with adjoining units to form a property line. Each unit has individual heating and plumbing systems.
Mobile home unit	A one-unit structure that was originally constructed to be towed on its own chassis.
2-, 3-, and 4-plex units per structure	A structure containing two, three, or four units and not classified as single-unit attached structure. The units in the structure share attic space and heating and plumbing systems.
5 or more units per structure	A structure containing five or more housing units. The units share attic space, and heating and plumbing systems.
Affordable Units	Any unit with a legally enforceable agreement for at least 30 years that restricts occupancy and requires affordable housing costs (Health and Safety Code section 50052.5) or affordable rent (Health and Safety Code section 50053) be provided to person(s) whose household income qualifies as extremely-low, very-low, low, or moderate income. Legally enforceable agreements may include deed-restrictions recorded by the local County Recorder or affordability restrictions enforceable by a public agency (e.g. local inclusionary ordinances or density bonus units).

6

DOF Annual Housing Unit Survey

- Annual tracking of jurisdiction-level housing unit activity through Housing Change Form
 - Part of DOF’s annual subcounty/county population estimates program
 - Survey of all 482 cities and 58 counties in California
 - new construction
 - conversions
 - demolitions
- ADU classification for DOF form
 - DOF follows the same definitions of housing structure types as the U.S. Census Bureau American Community Survey (ACS).
 - The DOF form can’t change any classification without Census first changing the categories measured in the ACS due to the benchmarking of our population estimates program on the decennial census.

7



Scenario 1 + ADU = Converting Existing Housing Type



Start with: 4 townhomes (single family attached-SFA) on single family (SF) lots

Add ADU: Convert existing bedroom/bath into ADU



Scenario 1 + ADU = Converting Existing Housing Type



Units with shared attic space & plumbing are defined as multi family housing units

Activity:
Convert 1 SFA into 2 MF

Result:
3 SFA & 2 MF on SF lots

SFA- single family attached
MF- multi family

Scenario 1 Alternative + ADU to primary unit



Why not track ADUs separately?

Separate rental unit from owner unit and retain primary unit type/usage and add accessory unit

Why not retain existing unit's primary status and have result be 4 SFA & 1 ADU?

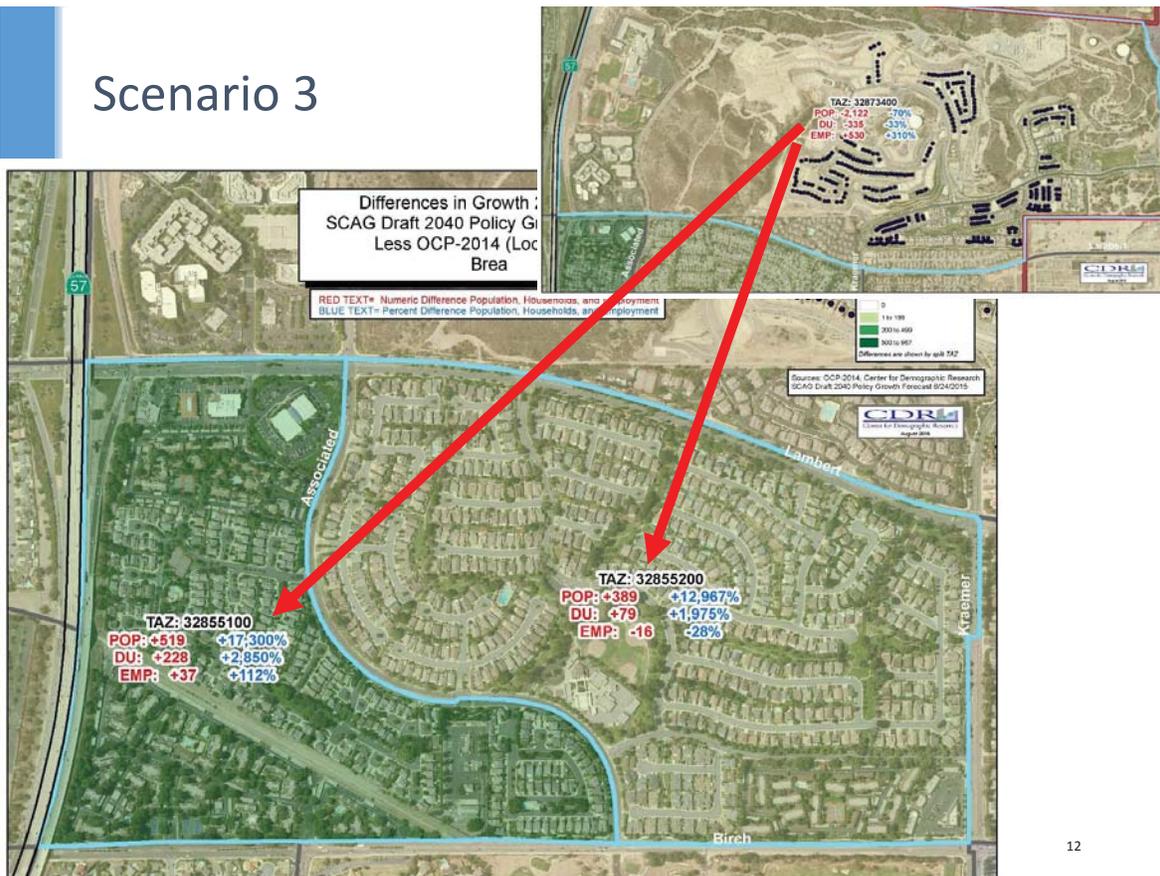
10

Scenario 2

- City X
- 2,000 housing units from American Community Survey (ACS)
 - All residential lots zoned single-family
 - No townhomes, apartments or multi-plex units in the city
 - 1,975 single family detached (SFD)
 - 25 attached accessory units = 25 single family attached (SFA)
- New ADU law and strict definitions would characterize these as multi-family structures & change housing stock to:
 - 1,950 single family detached
 - 50 multi-family with 2-4 units in structure; creates legal, non-conforming units

11

Scenario 3



12

Questions/Issues

- Artificial change in the makeup of a jurisdiction's housing stock if SF units are reclassified as MF
- Reclassifying SF units as MF will affect traffic modeling and household sizes
- These are accessory units by definition. Shouldn't the primary use of the lot and structure be retained and then separately track ADUs?
- Doesn't reclassification of SF to MF create a legal, non-conforming unit (i.e. multifamily on SF lot)? Isn't this in conflict with the legislation when it talks about consistency with general plan and zoning designations for lots?
- Will ADUs really create more housing stock or is this an artificial increase in units, except when new detached structure is added?
- What will the effect of ADUs be on things such as utilities, parking, schools, emergency response...?
- Can HOAs/CC&Rs prohibit ADUs?
- LUCA will be key in helping to identify ADUs.

13



Questions/Issues *(continued)*

- Census will count ADUs even if they aren't permitted
 - It is best to have unique address identifier for ADUs- different #, A/B unit ½
 - Census housing units are self-reported, so describing unit type isn't consistent
 - There is no formal process for "removing" an ADU from the housing stock if not in use or if new homeowner doesn't use the ADU or absorbs it back into original structure. If there is no response during the Decennial Census, they may not count the ADU as a separate unit and unit would "go away".
- There is no consistent numbering/addressing standards for ADU units across jurisdictions, and sometimes within jurisdictions. Agencies would prefer a consistent identifier process.
- There was recognition by all agencies that the technical/definitional conversion of SF units to MF units by adding an ADU to a SF structure may cause down-the-line issues such as changing the character of a jurisdiction by creating legal non-conforming units, changing the nature of a jurisdiction's housing mix, and traffic modeling results.

14



Accessory Dwelling Unit (ADU) Reference Info

- <http://www.leginfo.ca.gov/NewLaws.html>
 - SB 1069 (2016)
 - AB 2299 (2016)
 - AB 2406 (2016)
 - AB 2501 (2016)
- CA HCD ADU website
<http://www.hcd.ca.gov/policy-research/AccessoryDwellingUnits.shtml>
- CA HCD ADU Technical Assistance Booklet
<http://www.hcd.ca.gov/policy-research/docs/17Jan30-ADU-TA-Memo.pdf>
- CA Dept. of Finance (DOF) Housing Unit Change form & instructions
http://www.dof.ca.gov/Forecasting/Demographics/Housing_Unit_Survey/
- U.S. Census Bureau Housing Unit Definitions
<https://www.census.gov/construction/chars/definitions/>
- U.S. Census Bureau Local Update of Census Addresses Program (LUCA)
<https://www.census.gov/geo/partnerships/luca.html>

15



Contacts

John Boyne
CA Department of Finance
John.boyne@dof.ca.gov
(916) 327-0103 x2539

Tim McMonagle
Los Angeles Regional Office
U.S. Census Bureau
timothy.william.mcmonagle@census.gov
(818) 267-1730

Paul McDougall
CA Housing and Community Development
Paul.McDougall@hcd.ca.gov
(916) 263-7420

Deborah Diep
Center for Demographic Research
Cal State Fullerton
ddiep@fullerton.edu
(657) 278-4596



Technical Working Group

Agenda Item 2

DATE: September 7, 2017

TO: Community, Economic & Human Development (CEHD) Committee
Energy & Environment Committee (EEC)
Transportation Committee (TC)

FROM: Kimberly Clark, Regional Planner Specialist; 213-236-1844; clark@scag.ca.gov

SUBJECT: Guidelines and Schedule of the Bottom-Up Local Input and Envisioning Process for development of the 2020 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS)

EXECUTIVE DIRECTOR’S APPROVAL:**RECOMMENDED ACTION:**

For CEHD – Recommend for Regional Council adoption the proposed Bottom-Up Local Input and Envisioning Process Guiding Principles, which will form the basis of SCAG’s outreach and engagement with local jurisdictions in this stage of development for the 2020 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS).

For EEC and TC – Receive and File

EXECUTIVE SUMMARY:

In preparation for the 2020 Plan, SCAG will be engaging with local jurisdictions, subregions, and other stakeholders to inform development of the upcoming RTP/SCS. This collaborative process will entail four phases, and will be concurrent with the development of SCAG’s Regional Housing Needs Assessment (RHNA): (1) Regular Technical Consultation, (2) One-on-One Outreach and Local Input on Planned Growth (3) Regional Collaboration on Sustainable Communities Scenario Development, and (4) Engagement with the General Public on Potential Options for the SCS. Leading up to Phase 2’s kickoff in Fall 2017, staff has been working with SCAG’s Technical Working Group (TWG) and other stakeholders to refine and finalize the technical methodology for this process. Subregions will also provide essential assistance during the coming months to refine the approach and convene local jurisdictions for discussion and subsequent one-on-one meetings with SCAG staff.

STRATEGIC PLAN:

This item supports SCAG’s Strategic Plan:

Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies, and Objective (a): Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans

Goal 4: Develop, Maintain and Promote the Utilization of State of the Art Models, Information Systems and Communication Technologies, and Objective (b): Develop, maintain and enhance data and information to support planning and decision making in a timely and effective manner

BACKGROUND:

Southern California will be facing new challenges in the development of the 2020 RTP/SCS - principally transformational technologies in the transportation and employment sectors, new greenhouse gas (GHG)

reduction targets from the California Air Resources Board (CARB), new Federal Highway Administration planning requirements, MAP 21 performance metrics/goals, and a concurrent Regional Housing Needs Assessment (RHNA) cycle. Given these factors, it will be important to establish a solid baseline of existing policies and plans to understand how Southern California can accommodate future growth and thrive in the coming decades.

Staff proposes that the Bottom-Up Local Input and Envisioning Process be guided by the principles described here, with initial phases conducted to solicit input from local jurisdictions on base land use, population, household and employment growth, resource areas, sustainability practices, and local transit-supportive plans and policies to help decision makers understand how the region will perform under current circumstances to reach the forthcoming new GHG reduction targets from CARB. SCAG will also engage early with County Transportation Commissions (CTCs) to establish a regional picture of planned transportation infrastructure through the horizon year of the Plan in 2045. This information will then be used to develop potential scenarios for the 2020 RTP/SCS, through a structured and collaborative engagement with local jurisdictions, CTCs, a broad range of stakeholder groups, and the general public.

Bottom-Up Local Input and Envisioning Process Guiding Principles

1. SCAG will engage with jurisdictions one-on-one to establish a regional profile of base land use, population, household and employment growth, resource areas, sustainability practices, and local transit-supportive plans and policies. SCAG will also seek input from CTCs on planned transportation infrastructure through the horizon year of the RTP/SCS.
2. SCAG will assess the GHG reduction potential of existing plans and policies in the Southern California region, including the establishment of an RTP/SCS “base case” that takes into account local land use policies, planned growth, sustainability practices, resource areas, transit-supportive plans and policies, and anticipated transportation improvements for the RTP/SCS.
3. SCAG will develop multiple scenarios that explore a range of land use and transportation strategies. These scenarios will illustrate the impact of distinctive policy and investment choices, and will be examined in relation to the “base case” in order for local jurisdictions and stakeholders to evaluate the merits of regional decisions for the Plan.
4. Feedback on potential GHG reduction strategies will be solicited from local jurisdictions, CTCs, and other stakeholders through regional collaboration prior to inclusion in the draft SCS.
5. SCAG will also engage with the general public to help inform the draft SCS scenarios, in accordance with SB 375 and SCAG’s updated Public Participation Plan
6. The RHNA will be developed in coordination with the RTP/SCS.
7. Input from local jurisdictions throughout the process will be accepted from each jurisdiction’s city manager, community development/planning director, or their designee.

In conducting this collaborative process, SCAG will engage stakeholders in four phases, and will provide regular updates to Policy Committees on progress and feedback received. The 2020 RHNA will also be completed concurrently and in coordination with the Bottom-Up Local Input and Envisioning Process.

Bottom-Up Local Input and Envisioning Process Phases and Schedule***Phase 1: Regular Technical Consultation****(June 2017 – Spring 2020)*

To ensure transparency and technical veracity during all phases of this process, SCAG will have regular engagement with the TWG and will seek guidance from local jurisdictions, county transportation commissions, and other stakeholders as well. Initial consultation leading up to Phase 2 will include a review of the survey elements and list of geographic datasets that will undergo revision by local jurisdictions during Phase 2, and an initial overview of the anticipated scenario planning process for Phases 3 and 4.

Phase 2: One-on-One Outreach and Local Input on Planned Growth*(October 2017 – September 2018)*

SCAG will engage with subregions to explain the local input process for the 2020 RTP/SCS and will solicit one-on-one on-site meetings with each local jurisdiction to review the survey elements and geographic datasets individually with local staff. Input from this Phase will inform the RHNA and base conditions for the Plan, including the development of an RTP/SCS “base case” that takes into account locally planned growth, land use policies, sustainability practices, local transit-supportive plans and policies, and anticipated transportation improvements through the horizon year of the RTP/SCS. SCAG will provide limited on-site intern resources to support this effort, at the request of local jurisdictions.

Phase 3: Regional Collaboration on Scenario Development*(Spring 2018 – Spring 2019)*

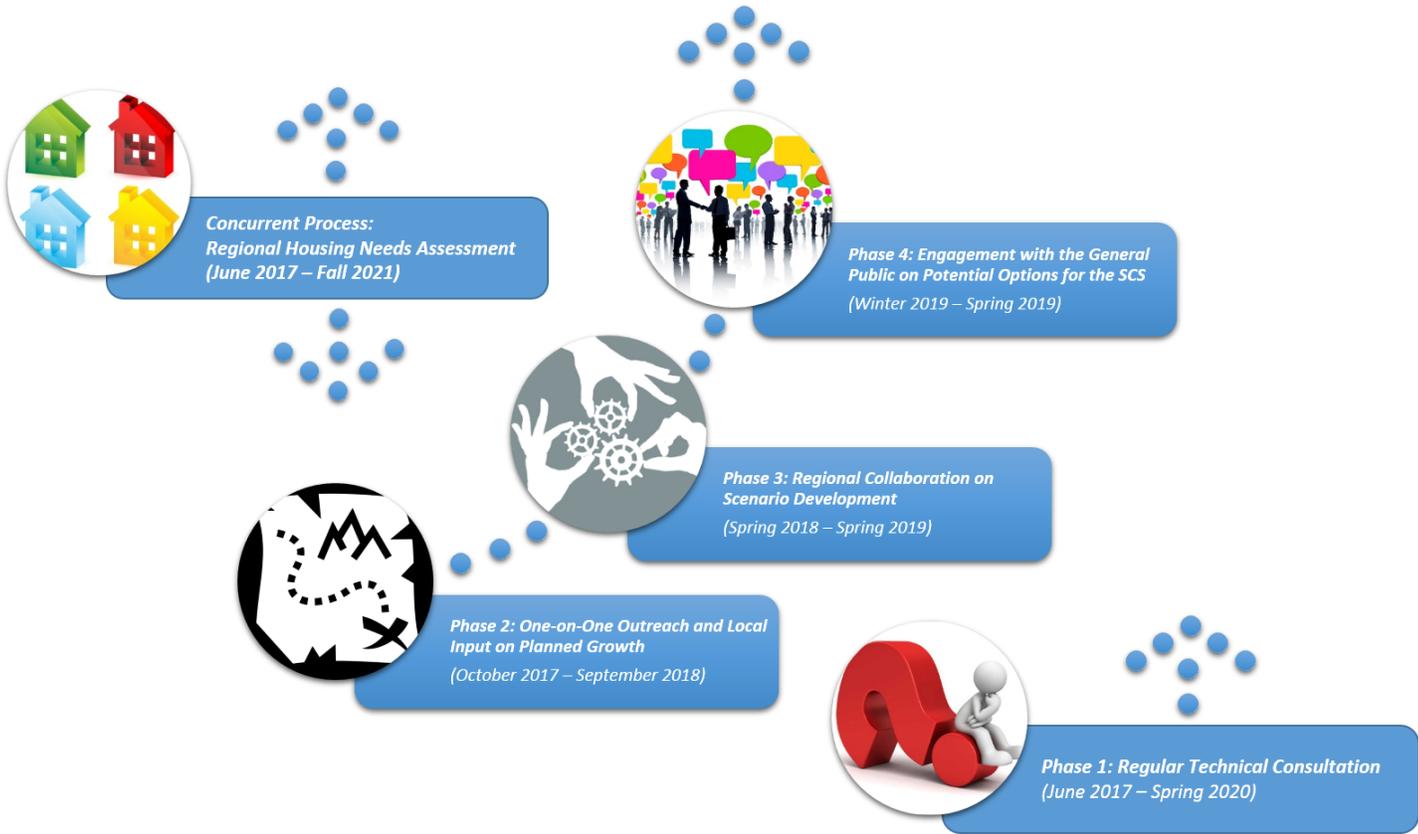
In collaboration with local jurisdictions and a broad range of stakeholder groups, SCAG will evaluate potential region-wide integrated land use and transportation planning strategies for inclusion in the draft Plan. Involvement in this effort will be solicited from city managers/planning directors (or their designees) and county transportation commissions; input will also be sought from transit providers, affordable housing advocates, transportation advocates, neighborhood and community groups, environmental advocates, home builder representatives, broad-based business organizations, landowners, commercial property interests, and homeowner associations, among others. Based on this collaborative process, SCAG will develop multiple scenarios that explore a range of land use and transportation strategies. These scenarios will illustrate the impact of distinctive policy and investment choices and will be compared to the “base case” in order for stakeholders to evaluate the merits of certain regional decisions.

Phase 4: Engagement with the General Public on Potential Options for the SCS*(Winter 2019 – Spring 2019)*

In accordance with SB 375, SCAG will solicit feedback from the general public through public workshops on potential GHG reduction strategies to inform the draft Plan. These workshops will equip the public with information and tools necessary to provide a clear understanding of the issues and policy choices at hand in the development of the draft SCS. At least one workshop will be held in each county in the region; for counties with over 500,000 people, a minimum of three workshops will be held.

Concurrent Process: Regional Housing Needs Assessment*(June 2017 – Fall 2021)*

The RHNA will be developed concurrently with the 2020 RTP/SCS. SCAG is engaging with the California Department of Housing and Community Development (HCD) to finalize the timeline. As outlined in SB 375, the growth forecast for the RTP/SCS will inform the RHNA and the SCS will identify areas within the region sufficient to house an eight-year projection of the housing need for the region.



FISCAL IMPACT:

Work associated with this item is included in the current FY 2017-2018 Overall Work Program (150-4069.04, Outreach and Technical Collaboration).



Technical Working Group

Agenda Item 3

DRAFT Scope of Work – Mapping Metro’s Transit Supportive Toolkit

Background:

SCAG will kick-off our Bottom-Up Local Input Process in October 2017 to establish the base land use, socioeconomic, and resource areas datasets for the 2020 Regional Transportation Plan and Sustainable Communities Strategy (RTP/SCS). This will involve a great deal of coordination and outreach with Southern California’s 197 jurisdictions and 15 subregions. For this cycle, SCAG has made a number of changes to the process from previous years – namely the modeling of the GHG reduction potential for a “Local Input” base case, which will consist solely of input from local jurisdictions down to the neighborhood level for all areas in the region.

When SCAG engages with stakeholders to craft an SCS scenario, it will be important to know how well the region is performing based on locally anticipated growth and planning practices. To fully understand the extent to which local jurisdictions have implemented sustainable-oriented practices, SCAG has expanded our previous cycle’s Local Input Survey to include new topics and added a number of datasets to the traditional items that have been requested for local feedback in past RTP/SCS cycles – including several of the measures specified in Metro’s Transit Supportive Toolkit.

This Toolkit specifies multiple measures that local jurisdictions can implement to help encourage transit ridership, usage of active transportation modes, and a subsequent reduction in local Vehicle Miles Traveled (VMT). These strategies are well supported and academically rigorous, as they are backed up with case studies and quantitative documentation identifying how they can help reduce VMT with local adoption. Through identifying where in the region these strategies are present, SCAG will be able to quantify the associated reduction in VMT in the “Local Input” base case as well as any potential scenarios. SCAG can also help other local jurisdictions benefit from understanding the process for adopting these “best practice” measures in their community.

Goal:

Use [Metro’s Transit Supportive Toolkit](#) as basis for geographic data refinement during SCAG’s Bottom-Up Local Input and Envisioning Process for the 2020 RTP/SCS. This will help SCAG assemble the geographic data that can be analyzed further and assembled as ingredients for scenario development in the Plan.

ITEMS TO BE MAPPED:

1. AHSC Projects + Phasing
2. Bike Sharing Stations + Service Area
3. Bike Stations
4. Caltrans Sustainable Transportation Planning Grant Program (Could be survey)
5. Car-sharing program parking (or citywide) and service areas
6. Community Design Overlays
7. Community Land Trusts
8. Corridor Plans
9. Historic Preservation Areas
10. Joint Public/Private Developments for Affordable Housing
11. Metro TOD Planning Grant Site + Phasing
12. Pedestrian Commercial Corridors – retail with front facing commercial (added by SCAG)
13. Areas with Minimum Densities (no maximums)
14. Overlay zoning areas

15. Parking management Districts
16. Areas with reduced Parking Minimums and Maximums
17. Special Districts (business improvement districts, parking districts, infrastructure financing districts, revitalization zones, service areas)
18. HCD TOD Housing Program Sites
19. TOD Oriented Specific Plans

Items that are implemented at the jurisdictional level can be mapped using the Local Input Survey, which includes questions addressing these tools:

ITEMS TO BE SURVEYED:

1. TOD Building Standards and Design Guidelines
2. Fast Track Permitting, Fee Waivers, and Other Financial/Process Incentives for Transit Oriented Neighborhoods
3. Form-Based Code
4. Transit Supportive General Plan Vision and Land Use Policies
5. Adopted Historic Preservation Financing Policies (Mills Act)
6. Incentives & Bonuses
7. Inclusionary Zoning
8. Innovative Parking Design
9. Linkage Fees
10. New Markets Tax Credit
11. Shared Parking Policies
12. Streetscape Standards and Design Guidelines
13. TDM Ordinance
14. Traffic Calming Measures
15. Transportation Master Plans

Process:

As several of these datasets have never been mapped at the local or regional level, SCAG has been working to generate each of these items in-house for review and revision by jurisdictions as part of the Bottom-Up Local Input and Envisioning Process. To increase the robustness and breadth of these draft datasets and reduce the amount of resources required for local review, SCAG will undergo a crowdsourcing effort to draw upon the interest and knowledge of local residents to fill in data gaps and produce a near-to-complete database for confirmation by local jurisdictions.

Scope of Work:

Task 1: Data Collection

SCAG staff have already begun assembling GIS shapefiles for mapped items 1 through 19 from a number of agencies. Since these layers will also be crowdsourced, SCAG is working to get at least five records for each item as a basis to solicit crowdsourced feedback, and will later work simultaneously with the crowd to fill in data items. Attributes of data items will also be unique according to the dataset, and metadata will be well documented.

Deliverable: Initial GIS shapefiles of items to be mapped

Timeline: July and August, 2017

Task 2: Create and Test Crowdsourced Web Tool

Using one of Esri's out-of-the-box web mapping platforms, SCAG will develop a crowdsourcing mapping tool for use by the general public to update the initial geographic data and add new records. The tool will be hosted on a unique policy focused and data-rich website, designed to be engaging and eye catching. SCAG will request input on the draft web tool from stakeholders through User Acceptance Testing (UAT) prior to launch.

Deliverable: Crowdsourcing Tool

Timeline: August and September, 2017

Task 3: Launch Website and Conduct Outreach to Local Jurisdictions and the Data Activist Community

SCAG will launch this project at our Technical Working Group, subregional standing planning directors meetings (as one element in the Bottom-Up Local Input and Envisioning Process), Open Data/Big Data Smart and Connected SCAG Region Committee, SCAG's Policy Committees, and will engage with non-profit data-focused organizations (e.g. HackLA, California Community Foundation) to advertise the information collection effort.

Deliverable: Published Outreach Materials

Timeline: September and October, 2017

Task 4: Review of Datasets with Local Jurisdictions

For the 2020 RTP/SCS, SCAG will be meeting one-on-one with each local jurisdiction in the region to refine the base data for use in the Plan – starting in November 2017 and carrying through until September 2018. Measures from the Toolkit will be crowdsourced simultaneously through July 2018, and SCAG will request feedback and confirmation of these datasets from local jurisdictions using the Scenario Planning Model (SPM) after this period. During the crowdsourcing time period, local jurisdictions will be provided a web link to the Crowdsourced Web Tool within the SPM and can view or supplement the datasets, as desired.

Deliverables: GIS Shapefiles with Locally Reviewed Data Mapping the Toolkit

Timeline: October, 2017 through September, 2018

Task 5: Integration of Data Elements into SCAG's Modeling for the 2020 RTP/SCS

SCAG will be seeking technical assistance from Metro on the proper analysis of VMT reduction impacts from the mapped measures in the Toolkit – specifically on the synergistic impacts of combined measures in any given area of the SCAG region. SCAG will also be engaging with regional planning directors and other stakeholders to craft potential SCS scenarios, for integration in the Plan.

Deliverables: Quantitative analysis of the GHG reduction potential of existing and planned measures from the "Local Input" base case, along with any potential SCS scenarios

Timeline: Spring 2018 through Spring 2019