



Proposed Approach for Housing Element Coordination for RHNA 5 for the 21 Jurisdictions in Mateo County

Prepared for the September 15, 2011 21 Elements TAC Meeting

Build-Upon Past Accomplishments

RHNA 4 Collaboration (2007-2014 Housing Element Planning Period)

- Sub-RHNA Process for RHNA 4 (2006–2007)
- 21 Elements for RHNA 4 (2007-2008)
- Preparation/Adoption of Jurisdiction Housing Elements (Target of June 2009)

RHNA 4 Implementation (2009-2011)

- Housing Element Implementation Phase for RHNA 4
- Ongoing 21 Elements Coordination

RHNA 5 Collaboration (2014-2022 Housing Element Planning Period)

- Sub-RHNA Process for RHNA 5 (2011–2012)
- 21 Elements for RHNA 5 (2012-2013)
- Preparation/Adoption of Jurisdiction Housing Elements (Target of October 2014)

Achieve Objectives for 21 Elements RHNA 5

- (1) Save Money, Time and Resources
- (2) Continue to Collaborate
- (3) Continue to Support the Sub-RHNA Process and Related Activities
- (4) Enhance Housing Element Quality
- (5) Assure a Timeliness of Products
- (6) Create Opportunities for Sharing and a Dialogue Around Common Issues
- (7) Facilitate HCD Review and Approval

Continue to Collaborate with HCD

According to results of the 21 Elements RHNA 4 exit survey, the collaboration with HCD was extremely helpful during the process and in achieving housing element certification. HCD also reports that the early, close collaboration facilitated the review process and made for high quality housing elements. For RHNA 5, 21 Elements will build on this foundation. In addition, the value of our cooperative and streamlined approach will continue to improve efficiencies for HCD and us in the future.

San Mateo County 21 Elements Approach for RHNA 5



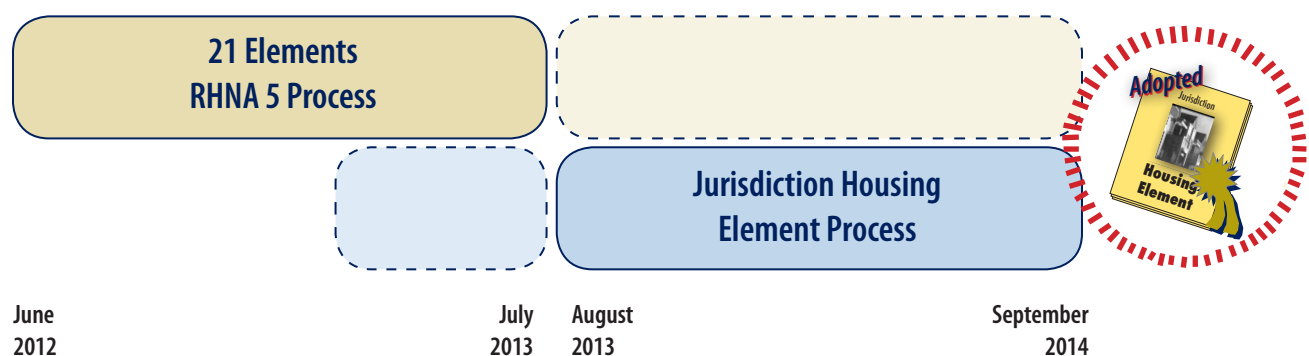
HCD Coordination Activities

- HCD participation in meetings via the phone or in person.
- Availability of Paul McDougall as liaison and supervisor for San Mateo County housing elements.
- HCD review of forms, templates and methodologies from 21 Elements.
- HCD tours for jurisdictions that are interested.
- (New) Optional pre-submittal meetings with HCD where the previous housing element is reviewed and areas of potential heightened scrutiny are discussed. HCD would also review and comment on material from the **BASIC PLUS** or **EXTENDED** packages, as described on the next pages, and provide a letter saying the material appears to meet the statutory requirements.
- (New) HCD has expressed a willingness to consider assigning reviewers early-on in the process so jurisdictions have a point of contact to provide technical assistance prior to submitting the housing element and a consistent face at the tours, the pre-submittal meeting, and throughout the process.

Ensure that the Schedule Enables Jurisdictions to Adopt their Housing Element by the October 2014 Deadline

Housing Elements for RHNA 5 are due October 2014, or 18 months after the Regional Transportation Plan is adopted. This is two years after the RHNA allocation is scheduled to be finalized and three years from now. As a result of SB 375, a local government that adopts its housing element on-time (or within a 120 day grace period) will not have to adopt another housing element for eight years (2022). A local government that does not adopt a housing element by this deadline must adopt a new housing element every four years (2018 and 2022). With this deadline for housing element adoption in mind, below is proposed generalized schedule for the major activities for the 21 Elements RHNA 5 process.

Proposed Generalized Timeline





Tailor a Range of Choices to Best Fit Jurisdiction Needs for the RHNA 5 Housing Element Update Process

The proposed approach for 21 Elements for RHNA 5 would be that each jurisdiction could choose one of the three packages below to best fit their needs. Packages 2 and 3 would contain write-ups specific to the jurisdiction. All write-ups would be prepared based on close collaboration, direction

Possible Choices for Each Jurisdiction



BASIC Package

Same as 21 Elements for RHNA 4 with improvements — would include countywide level data and write-ups, and compilation of jurisdiction-specific data.

Similar Tasks to RHNA 4

- Templates, content outlines, methodologies, legal requirements and compliance, website, TAC meetings
- HCD coordination, approval of approach and methodologies, tours
- Countywide and jurisdiction-specific housing needs and other background data and charts
- Countywide non-governmental constraints
- Governmental constraints surveys (fees, land use controls, inclusionary requirements, etc.)
- List of at-risk units
- Special topics and best practices (i.e. second units, SB2 follow-up, etc.)
- Community outreach materials
- Compilation of policies and programs, HCD review letters, etc.
- Archiving of jurisdiction's working files for jurisdictions experiencing staff turnover

New Tasks Proposed for RHNA 5

- More extensive outreach to key countywide stakeholder groups, including interest groups meetings and documentation of comments
- Generalized environmental review template and list of source documents (Initial Study and Negative Declaration)

San Mateo County 21 Elements Approach for RHNA 5



BASIC PLUS Package

All of the BASIC Package PLUS analysis and write-ups of the Housing Element Background and Other Sections for each jurisdiction.

- Completed table with review of the jurisdiction's current Housing Element ("Review and Revise")
- Jurisdiction-specific write-ups of the jurisdiction's Housing Element Background section (Housing Needs, Non-Governmental Constraints, Other Issues — does not include analysis and write-up of Housing Sites Inventory or Potential Governmental Constraints)
- Tailored community outreach materials for the jurisdiction
- Community outreach workshop conducted in jurisdiction
- Review of write-ups with HCD through informal consultation process. **

EXTENDED Package

Available to jurisdictions with a certified housing element for the RHNA 4 planning period. All of the BASIC and BASIC PLUS Packages with analysis and write-ups for each jurisdiction covering Site Inventory and Potential Governmental Constraints.

- Jurisdiction-specific site inventory analysis, write-up, and review and consultation with HCD.
- Jurisdiction-specific potential governmental constraints analysis, write-up, and review and informal consultation with HCD. **

**INFORMAL CONSULTATION WITH HCD

What is Informal Consultation? Based on initial discussions with HCD staff, informal consultation would include review of completed preliminary draft sections of the housing element and the preparation of a checklist response as to items that must be covered or considered when the completed Draft Housing Element is submitted for HCD's formal 60-day review process.

How can Informal Consultation be helpful? The intent of informal consultation, as defined here and through our discussions with HCD, is to narrow down the list of HCD concerns, thus making the process more transparent and efficient for the jurisdictions and HCD staff when more formal review occurs. This early consultant is seen by HCD as being extremely beneficial in achieving housing element certification. Also as part of informal consultation, HCD has promised to assign a reviewer early on so that person would be accompanying us on the jurisdiction tours. Assignment of a specific reviewer should provide efficiencies for HCD and the jurisdiction.



HOW COULD IT WORK? EACH JURISDICTION WOULD SELECT ONE OF THE PACKAGES BELOW*

BASIC Package	BASIC PLUS Package	EXTENDED Package
<p>The BASIC Package would be the same as 21 Elements for RHNA 4 with improvements. The package includes countywide level data and write-ups, and compilation of jurisdiction-specific data.</p> <ul style="list-style-type: none"> ■ Templates, content outlines, methodologies, legal requirements and compliance, website, TAC meetings ■ HCD coordination, approval of approach and methodologies, tours ■ Countywide and jurisdiction-specific housing needs and other background data and charts ■ Countywide non-governmental constraints ■ Governmental constraints surveys (fees, land use controls, inclusionary requirements, etc.) ■ List of at-risk units ■ Special topics and best practices (i.e. second units, SB2 follow-up, etc.) ■ Community outreach materials ■ Compilation of policies and programs, HCD review letters, etc. ■ Archiving of jurisdiction's working files for jurisdictions experiencing staff turnover ■ More extensive outreach to key countywide stakeholder groups, including interest groups meetings and documentation of comments ■ Generalized environmental review template and list of source documents (Initial Study and Negative Declaration) 	<p>Includes the BASIC Package and analysis and write-ups of the Housing Element Background and Other Sections for each participating jurisdiction.</p> <p><i>Added to the Basic Package</i></p> <ul style="list-style-type: none"> ■ Completed table with review of the jurisdiction's current Housing Element ("Review and Revise") ■ Jurisdiction-specific write-ups of the jurisdiction's Housing Element Background section (Housing Needs, Non-Governmental Constraints, Other Issues — does <u>not</u> include analysis and write-up of Housing Sites Inventory or Potential Governmental Constraints) ■ Tailored community outreach materials for the jurisdiction ■ Community outreach workshop conducted in jurisdiction ■ Review of write-ups with HCD through informal consultation with HCD staff. 	<p>Available to jurisdictions with a certified housing element for the RHNA 4 planning period. All of the BASIC Package and BASIC PLUS Package with analysis and write-ups for each participating jurisdiction covering Site Inventory and Potential Governmental Constraints.</p> <p><i>Added to the Basic and Basic Plus</i></p> <ul style="list-style-type: none"> ■ Jurisdiction-specific site inventory analysis, write-up, and review and consultation with HCD. ■ Jurisdiction-specific potential governmental constraints analysis, write-up, and review and consultation with HCD.
<p><i>Proposed Cost: Equal cost for each jurisdiction. Jurisdictions responsible for 25% of total BASIC Package costs.</i></p>	<p><i>Proposed Cost: Equal cost for each jurisdiction. Jurisdictions responsible for 50% of total BASIC PLUS Package costs.</i></p>	<p><i>Proposed Cost: Equal cost for each jurisdiction. Jurisdictions responsible for 75% of total EXTENDED Package costs.</i></p>

* Please note that the three packages do NOT include tasks for updating housing goals, policies and programs, preparation of the complete Draft Housing Element, formal HCD review and comment, public hearings and environmental review.



Summary Comparison of Proposed Packages for 21 Elements for RHNA 5

Task Area	BASIC Package	BASIC PLUS Package	EXTENDED Package
Review and Revise (Current Housing Element)	Template, Methodology and Outline; Compilation of Jurisdiction "Best Practices"/Other Comments	Review of jurisdiction's adopted Housing Element goals, policies and programs. Update table and prepare write-up specific to the jurisdiction of accomplishments and evaluation.	Same as Basic Plus Package
Existing Housing Needs	Template, Methodology and Outline; Population, Employment, and Housing Characteristics; Overpayment and Overcrowding; Extremely-Low Income Housing Needs.	Prepare write-up specific to the jurisdiction; include more information on Housing Stock Characteristics; Assisted Housing Developments "At Risk" of Conversion, etc.	Same as Basic Plus Package
Special Housing Needs	Template, Methodology and Outline; Persons with Disabilities; Seniors; Large Families; Female Headed Households; Farmworkers; Families and Persons in Need of Emergency Shelters	Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package
Projected Housing Needs	Template, Methodology and Outline (Counting Housing Units); Regional Housing Needs Allocation	Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package
Sites Inventory and Analysis	Template, Methodology and Outline	Same as Basic Package	Inventory; Summary; Parcel-Specific Listing and Evaluation of Realistic Capacity; Prepare write-up specific to each jurisdiction.



Summary Comparison of Proposed Packages for 21 Elements for RHNA 5

Task Area	BASIC Package	BASIC PLUS Package	EXTENDED Package
Potential Governmental Constraints	Template, Methodology and Outline; surveys of jurisdiction fees, standards, etc.; write-up of special issues	Same as Basic Package	Land-Use Controls; Fees and Exactions; Processing and Permit Procedure; Codes and Enforcement; On-Off-Site Improvements; Constraints-Housing for Persons with Disabilities; Inclusionary Housing; prepare write-up specific to each jurisdiction.
Potential Non-Governmental Constraints	Template, Methodology and Outline; Potential Non-Governmental Constraints (Most nongovernmental constraints are similar throughout San Mateo County)	Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package
Other Housing Element Content Requirements and Analysis	Template, Methodology and Outline; Analysis of Consistency with General Plan; Coastal Zone Requirements; Priority for Water and Sewer; Redevelopment and Other Housing Funding; Opportunities for Energy Conservation; Second Units; etc.	Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package
Public Participation and Review Process	Generic materials prepared (handouts, etc.). Implement public participation strategy and prepare write-up specific to each jurisdiction. Outreach is proposed to be conducted with special interest groups and groups of particular interest (low income, service providers, etc).	Implement public participation strategy and prepare write-up specific to each jurisdiction. 21 Elements could conduct one workshop in each jurisdiction and 3-4 in the unincorporated areas of the county. Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package



Summary Comparison of Proposed Packages for 21 Elements for RHNA 5

Task Area	BASIC Package	BASIC PLUS Package	EXTENDED Package
Goals, Policies and Implementing Programs	Database of Housing Element policies and programs	Same as Basic Package	Same as Basic Package
Environmental Review	Generic Initial Study and list of resources.	Same as Basic Package	Same as Basic Package
Miscellaneous Topics	Special studies, "best practices," etc. Tours with HCD staff. Review of HCD letter and checklist of common HCD comments. Templates for Annual Review	Update studies and information and link to the jurisdiction. Prepare write-up specific to the jurisdiction.	Same as Basic Plus Package
Coordination	TAC Meetings and coordination with jurisdiction staff to obtain information. Use of the listserve and website.	Collaboration with jurisdiction staff in providing direction and review of draft products. All write-ups would be prepared based on direction of jurisdiction staff.	Same as Basic Plus Package with the additional items included
Proposed Cost	Equal cost for each jurisdiction. Jurisdictions responsible for 25% of total BASIC Package costs.	Equal cost for each jurisdiction. Jurisdictions responsible for 50% of total BASIC PLUS Package costs.	Equal cost for each jurisdiction. Jurisdictions responsible for 75% of total EXTENDED Package costs.