



Western Riverside Council of Governments Planning Directors Committee

AGENDA

**Thursday, December 9, 2021
9:30 AM**

**Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501**

WRCOG'S OFFICE IS CURRENTLY CLOSED TO THE PUBLIC DUE TO COVID-19

[Join Zoom Meeting](#)

Meeting ID: 812 1983 7916

Password: 120821

Dial in: (669) 900 9128 U.S.

SPECIAL NOTICE – COVID-19 RELATED PROCEDURES IN EFFECT

Due to the State or local recommendations for social distancing resulting from the threat of Novel Coronavirus (COVID-19), this meeting is being held via Zoom under Assembly Bill 361 (Government Code Section 54953) (AB 361). Pursuant to AB 361, WRCOG does not need to make a physical location available for members of the public to observe a public meeting and offer public comment. AB 361 allows WRCOG to hold Committee meetings via teleconferencing or other electronic means and allows for members of the public to observe and address the committee telephonically or electronically.

In addition to commenting at the Committee meeting, members of the public may also submit written comments before or during the meeting, prior to the close of public comment to snelson@wrcog.us.

Any member of the public requiring a reasonable accommodation to participate in this meeting in light of this announcement shall contact Suzy Nelson 72 hours prior to the meeting at (951) 405-6703 or snelson@wrcog.us. Later requests accommodated to the extent feasible.

The Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

- 1. CALL TO ORDER (John Hildebrand, Chair)**
- 2. PLEDGE OF ALLEGIANCE**

3. ROLL CALL

4. PUBLIC COMMENTS

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda 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. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

5. CONSENT CALENDAR

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

A. Summary Minutes from the October 14, 2021, Planning Directors Committee Meeting

Requested Action(s): 1. Approve the Summary Minutes from the October 14, 2021, Planning Directors Committee meeting.

B. Approval of Planning Directors Committee 2022 Meeting Schedule

Requested Action(s): 1. Approve the Schedule of Planning Directors Committee meetings for 2022.

6. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion.

A. REAP Grant Program - Local Staff Augmentation and Housing Legislation Implementation Assistance Project Work-plan

Requested Action(s): 1. Receive and file.

B. Objective Design Standards Toolkit Summary

Requested Action(s): 1. Receive and file.

C. Housing Legislation Priorities

Requested Action(s): 1. Receive and file.

7. REPORT FROM THE DEPUTY EXECUTIVE DIRECTOR

Chris Gray

8. ITEMS FOR FUTURE AGENDAS ~ Members

Members are invited to suggest additional items to be brought forward for discussion at future Executive Committee meetings.

9. GENERAL ANNOUNCEMENTS ~ Members

Members are invited to announce items / activities which may be of general interest to the Executive Committee.

10. NEXT MEETING

The Planning Directors Committee meeting in January is canceled. The next Planning Directors Committee meeting is scheduled for February 10, 2022, at 9:30 a.m., virtually on the Zoom

platform.

11. ADJOURNMENT

Planning Directors Committee

Minutes

1. CALL TO ORDER

The meeting of the WRCOG Planning Directors Committee was called to order by Chair John Hildebrand at 9:31 a.m. on October 14, 2021, on the Zoom platform.

2. PLEDGE OF ALLEGIANCE

Chair Hildebrand led members and guests in the Pledge of Allegiance.

3. ROLL CALL

- City of Beaumont - Christina Taylor
- City of Corona - Jay Eastman
- City of Jurupa Valley - Diane Guevara*
- City of Lake Elsinore - Richard MacHott
- City of Menifee - Doug Darnell
- City of Moreno Valley - Chris Ormsby
- City of Murrieta - Jarrett Ramaiya
- City of Perris - Kenneth Phung
- City of Riverside - Mary Kopaskie-Brown
- City of San Jacinto - Travis Randel
- City of Wildomar - Matt Bassi
- County of Riverside - John Hildebrand (Chair)
- Riverside Transit Agency - Kristin Warsinski

*Arrived after roll call

4. PUBLIC COMMENTS

There were no public comments.

5. CONSENT CALENDAR – (San Jacinto / Lake Elsinore) 9 yes; 0 no; 2 abstention. Item 5.A was approved. The Cities of Murrieta, and Riverside abstained. There was no response from the City of Moreno Valley.

A. Summary Minutes from the September 9, 2021, Planning Directors Committee Meeting

Action:

1. Approved the Summary Minutes from the September 9, 2021, Planning Directors Committee meeting.

6. REPORTS / DISCUSSION

A. VMT Implementation Assistance - VMT Calculator Demonstration

Christopher Tzeng, WRCOG Program Manager, introduced Paul Hermann with Fehr & Peers who provided a demonstration of a Vehicle Miles Traveled (VMT) calculator tool to assist member agencies with VMT implementation. WRCOG staff have been reviewing what other Council of Governments have been developing to assist local jurisdictions with VMT implementation associated with requirements of SB 743. One tool, a VMT calculator, has been developed for nearby jurisdictions which assists with the estimation of VMT using data from the regional model (without needing to run the local model). A VMT calculator can be used for most small projects that do meet VMT screening requirements and help jurisdictions review estimates developed by consultants.

Mr. Hermann demonstrated a draft VMT calculator tool utilized by the San Bernardino County Transportation Authority. Committee members provided comments that a VMT calculator would be useful and requested staff to work with the project team to develop a Scope of Work and deliverables.

Action:

1. Received and filed.

B. Proposed Revisions to Grant Writing Assistance Program Guidelines

Christopher Tzeng provided an update on, and proposed revisions to, the Grant Writing Assistance Program. The Grant Writing Assistance Program commenced in September 2017 to assist member agencies in grant writing assistance on an as-needed basis while funding was available. To date, the Program has assisted member agencies attain over \$67 million in grant funding. The goal of this Program is to strengthen the subregion's overall competitiveness for statewide funding and to provide needed supplemental support to jurisdictions prevented from seeking grant funds due to limited capacity and/or resources. The Program was able to kick-start as a result of excess revenues from other programs that the Executive Committee decided to provide back to member agencies; however, WRCOG is unable to dedicate the same amount of funds to the Program at this time, so staff have reviewed the Program Guidelines to evaluate how the Program can become more sustainable.

One caveat for the near-term future of the Program is that WRCOG is receiving Regional Early Action Planning (REAP) grant funds through SCAG with the goal of assisting member agencies increase housing production and planning. WRCOG has received approval from SCAG to allocate some of the REAP funds to assist member agencies develop grant applications in identified housing-related grant programs to help achieve this goal. All of the programs identified in the housing-related grant programs will be funded through REAP funds that must be utilized by June 30, 2023.

Proposed revisions to the Guidelines include the amount of direct assistance a WRCOG member agency receives per grant program and per two-year cycle; how a member agency receives direct assistance; and the type of assistance eligible for assistance through the Program. There were five revisions proposed to the Committee and staff is seeking feedback on the proposed revisions to the Guidelines. Please contact Christopher Tzeng with comments.

WRCOG will present the proposed revisions at a future Public Works and Technical Advisory Committee meeting. After all feedback is compiled, staff will then present a final proposed Program Guidelines to

each committee with anticipated completion in winter 2021.

Action:

1. Received and filed.

C. TUMF Unique Use Calculations

Cameron Brown, WRCOG Program Manager, presented on the calculations used by the TUMF Program to determine fees for special use categories. The TUMF Program relies on the TUMF Nexus Study to analyze how new development affects local and regional traffic conditions. TUMF fees are assessed to mitigate additional traffic induced by the development of residential, commercial, and industrial projects. The Nexus Study also uses data from the ITE Trip Generation Manual to determine new trips created by new development. The trip generation drives the different fees for different uses.

The TUMF Calculation Handbook makes use of unique calculations for appropriate fees when there is no defined dwelling unit or gross floor area, or where trips would differ from normal residential, commercial, or industrial uses. Some of these uses include Active Senior Living, fuel stations, and high-cube warehousing. The Nexus Study update will provide an opportunity to revise these calculations and/or to determine if there are new types of development that need to be considered. Staff will be soliciting input throughout the Nexus Study update from WRCOG's various committees regarding possible new uses.

Action:

1. Received and filed.

D. Legislative Activities Update

Bill Blankenship, WRCOG's On-Call Legislative Consultant, provided an update and overview of current key legislative dates and deadlines for the remaining portion of the 2021 Legislative Session. The last day for the Legislative Session is September 10, and the last day for the Governor to sign or veto bills is October 10.

Below are housing bills signed into law:

- SB 9 – Allows for lot splits in single-family residential areas; sitting on the Governor's desk for signature. One key amendment includes that a municipality can declare that a duplex is not warranted due to health safety reasons.
- SB 10 – Allows agencies to up-zone residential density by up to 10 units in transit rich areas; sitting on the Governor's desk for signature. This Bill has an exemption to the California Environmental Quality Act and there is a sunset provision of January 1, 2029. This Bill also contains an opt-in option.
- AB 68 – Annual Statewide Housing Plan.
- Ab 571 – Amends "Density Bonus Law" to grant a fee waiver.
- AB 602 – Housing impact fees basked on the square footage of a unit.

Also highlighted were housing bills signed into law prior to the end of the 2021 legislative session.

- SB 7 – Environmental Leadership Act of 2021.

- AB 140 – Housing and Homeless Provisions, 2021 Budget Act.
- AB 687 – Western Riverside County Housing Trust.

Action:

1. Received and filed.

7. REPORT FROM THE DEPUTY EXECUTIVE DIRECTOR

Chris Gray reported that staff is calling for input on a trip generation study on single-family units and is looking to see if there is a relationship between home prices, home square footage, and trip generation. Staff requested sample traffic counts at a variety of locations around the subregion to develop a statistical model that looks at the home size versus trip counts per unit and takes into consideration the different areas analyzed.

Members were reminded that the TUMF CCI Adjustment Resolution needs be adopted by all member agencies to ensure that fees can be implemented by January 1, 2022. Staff can be made available for any council if any presentations should be needed.

8. ITEMS FOR FUTURE AGENDAS

There were no items for future agendas.

9. GENERAL ANNOUNCEMENTS

Committee member Matt Bassi reported that the City of Wildomar's City Council has adopted its Housing Element.

10. NEXT MEETING

The Planning Directors Committee meeting in November is canceled. The next Planning Directors Committee meeting is scheduled for Thursday, December 9, 2021, at 9:30 a.m., on the Zoom platform.

11. ADJOURNMENT

The meeting of the Planning Directors Committee adjourned at 10:55 a.m.



Western Riverside Council of Governments Planning Directors Committee

Staff Report

Subject: Approval of Planning Directors Committee 2022 Meeting Schedule
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: December 9, 2021

Requested Action(s):

1. Approve the Schedule of Planning Directors Committee meetings for 2022.

Purpose:

The purpose of this item is to provide and obtain approval of a meeting schedule for 2022.

Background:

Below are the proposed 2022 meeting dates for the Planning Directors Committees (PDC). All PDC meeting dates are proposed for the 2nd Thursday of the month, monthly, at 9:30 a.m.

Day and Time	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
2nd Thurs. @ 9:30 a.m.	Canceled	10	10	14	12	9	14	11	8	13	10	8

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact.

Attachment(s):

None.



Western Riverside Council of Governments Planning Directors Committee

Staff Report

Subject: REAP Grant Program - Local Staff Augmentation and Housing Legislation Implementation Assistance Project Work-plan

Contact: Christopher Tzeng, Program Manager, ctzeng@wrcog.us, (951) 405-6711

Date: December 9, 2021

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide a summary of the proposed projects to continue assisting member agencies with housing planning activities through the Regional Early Action Planning (REAP) grant program.

Background:

SCAG's REAP Subregional Partnership Program is intended to increase planning to accelerate housing production throughout the SCAG region through implementable actions that will increase housing supply to meet the 6th Cycle Regional Housing Needs Assessment (RHNA). The Subregional Partnership Program has been designed to augment and complement funds that are awarded to jurisdictions by the California Department of Housing and Community Development pursuant to SB 2 Planning Grants and the Local Early Action Program. WRCOG was allocated \$1.678 million through the Subregional Partnership Program to provide assistance to the local jurisdictions. WRCOG proposed projects to utilize the allocated funding, which was shared with this Committee in late 2020, and entered into a Memorandum of Understanding with SCAG in March 2021 that includes approval of the proposed projects.

One of the approved REAP projects WRCOG proposed is to provide a contract planning consultant bench for WRCOG member agencies to utilize. The purpose of this REAP project is to provide member agencies with staff augmentation and housing legislation implementation assistance through a list of potential staff augmentation activities. Each activity is designed to help facilitate local housing production during the planning phase. This draft list is brought forth to the Committee for input. The draft list, along with a general Scope, has been developed and is attached to this report for review and comment. Activities listed have been identified through feedback sought by member agency staff on its top priorities to help advance their respective housing goals. A summary of legislation implementation and staff augmentation activities is below.

This initiative includes a list of specific tasks related to implementing recent California housing legislation, including bills about Accessory Dwelling Units, the Density Bonus law, Surplus Lands disposition, zoning

law, and development streamlining, as well as staff augmentation to assist with housing-related local actions. Budget estimates have been prepared for each activity. A consultant(s) will be procured to provide this assistance and jurisdictions may select which project(s) they would like to undertake. As this work-plan was developed to provide representative services to all WRCOG member agencies, the specific scope and fee for a project may be modified to reflect a jurisdiction's unique circumstances and needs.

Legislation Implementation Activities

- ADU Ordinance
- SB 35 / 330 Applications Review
- SB 35 / 330 Applications Development
- SB 35 Promotion and Resources
- Municipal Code Updates
- Density Bonus Law User Guide
- Municipal Code Revision: Density Bonus Law
- Surplus Land Act Implementation Assistance
- SB 9 User Guide
- Development Application Approvals and Timelines Guide
- SB 10 Ordinance

Staff Augmentation Activities

- Development Application Review
- ADU FAQ and Construction Process User Guide
- Transit Priority Area Mapping and FAQ Document
- Development Impact Fee Structure Review
- Pro-housing Designation
- Community Engagement

Prior Action(s):

March 1, 2021: The Executive Committee authorized the Executive Director to execute an MOU, substantially as to form, with SCAG for the REAP Subregional Partnership Program.

Fiscal Impact:

Transportation and Planning Department activities are included in the Agency's adopted Fiscal Year 2021/2022 Budget under the Transportation Department. In addition, this project is covered by REAP funding that has already been approved by SCAG.

Attachment(s):

[Attachment 1 - WRCOG Workplan Development - Staff Augmentation Projects](#)



WRCOG REAP - Staff Augmentation and Housing Legislation Implementation Assistance Workplan

Final Workplan

DRAFT

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Executive Summary

WRCOG REAP Staff Augmentation and Housing Legislation Implementation Assistance Workplan

The purpose of this initiative is to provide WRCOG jurisdictions with staff augmentation and housing legislation implementation assistance through a list of potential staff augmentation activities. This initiative also includes developing a list of specific tasks related to implementing recent California housing legislation, including bills about ADUs, Density Bonus law, Surplus Lands disposition, zoning law, and development streamlining.

Activities listed have been identified through feedback sought by jurisdiction staff on their top priorities to help advance their respective housing goals. A summary of legislation implementation and staff augmentation activities is below.

Summary of Draft Legislation Implementation and Staff Augmentation Activities

Legislation Implementation Activities

- Accessory Dwelling Unit (ADU) Ordinance
- Senate Bill (SB) 35/330 Applications Review
- Senate Bill (SB) 35/330 Applications Development
- Senate Bill (SB) 35 Promotion and Resources
- Municipal Code Updates
- Density Bonus Law User Guide
- Municipal Code Revision: Density Bonus Law
- Surplus Land Act Implementation Assistance
- Senate Bill (SB) 9 User Guide
- Development Application Approvals and Timelines Guide
- Senate Bill (SB) 10 Ordinance

Staff Augmentation Activities

- Development Application Review
- Accessory Dwelling Unit (ADU) FAQ and Construction Process User Guide
- Transit Priority Area (TPA) Mapping and FAQ Document
- Development Impact Fee (DIF) Structure Review
- Prohousing Designation
- Community Engagement



Accessory Dwelling Unit (ADU) Ordinance

Project Summary

Create or update an ADU Ordinance to be incorporated into a jurisdiction's municipal code. This ordinance would comply with all state legislation, including but not limited to lot and building size requirements, setback requirements, development standards, permitting processes and timelines, allowed zones, etc. The ordinance would also identify sections of the jurisdiction's municipal code which must be repealed or amended to comply with ADU legislation and/or remain consistent with the ADU ordinance.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Draft ADU Ordinance:** Prepare a draft ADU ordinance in Word document form. The ordinance will be compliant with all applicable state ADU legislation and will include building size requirements, setback requirements, development standards, permitting processes and timelines, allowed zones, etc. This task includes time for researching pertinent ADU legislation and creating an Excel matrix of case studies and current language related to ADUs in the jurisdiction's municipal code and identifying necessary revisions. This task assumes up to one (1) engagement with stakeholders and up to three (3) meetings with jurisdiction staff to coordinate specific development standards to include and review state-mandated elements.

Deliverables:

- i. Excel matrix of current municipal code language and case studies related to ADUs and identification of necessary revisions
- ii. Draft ADU ordinance

3. **Final ADU Ordinance:** Prepare a final ADU ordinance in Word document form. This task assumes up to two (2) meetings with jurisdiction staff to coordinate revisions to the draft ordinance, as well as optional support for facilitating the adoption of the ordinance by the jurisdiction's Planning Commission and/or City Council. This optional support would include up to two (2) meetings with jurisdiction staff to coordinate tasks for the adoption process, preparing up to two (2) staff report memos,



preparing up to two (2) sets of presentation slides, and preparing to deliver up to two (2) presentations to Planning Commission and/or City Council.

Deliverables:

- i. Final ADU ordinance
- ii. Up to two (2) staff report memos
- iii. Up to two (2) sets of presentation slides for Planning Commission and/or City Council meeting adopting ADU ordinance

DRAFT



Senate Bill (SB) 35/330 Applications Review

Project Summary

Review preliminary applications or full applications based on HCD templates and existing jurisdiction-specific documents. Preliminary applications will be consistent with requirements of SB 330 and will be designed to be used for projects seeking streamlined ministerial approval pursuant to SB 35. Full applications will be consistent with SB 35 and jurisdictions' objective policies and procedures.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

- 2.1. **Draft Review of Preliminary Application:** Review the jurisdiction's draft SB 35- and 330-compliant residential development preliminary application. The review will check for consistency with SB 35 and 330 and will provide comments on any items which are noncompliant with the legislation and suggestions for additional content to comply with the legislation. The review will additionally provide any suggestions for increasing clarity of the document and facilitating easier use. Comments and suggestions will identify the applicable language in the draft document, the suggested change, and the source legislation item. This task assumes one (1) meeting with jurisdiction staff to review the preliminary application draft review.

Deliverables:

- i. Comments and suggested revisions in the draft preliminary application document

- 2.2. **Final Review of Preliminary Application:** Finalize the review of the preliminary application based on City staff comments and develop a memo summarizing main themes of the suggested revisions.

Deliverables:

- i. Final comments and suggested revisions in the draft preliminary application document

- ii. Memo summarizing main themes of suggested revisions

3.1. Draft Review of Full Application: Review the jurisdiction's draft SB 35-compliant residential development application. The review will check for consistency with SB 35 and will provide comments on any items which are noncompliant with the legislation and suggestions for additional content to comply with the legislation. As part of the legislative compliance check, this review will check any referenced procedures or municipal code sections to ensure they are compliant with SB 35. The review will additionally provide any suggestions for increasing clarity of the document and facilitating easier use. Comments and suggestions will identify the applicable language in the draft document, the suggested change, and the source legislation item. This task assumes one (1) meeting with jurisdiction staff to review the preliminary application draft review.

Deliverables:

- i. Comments and suggested revisions in the draft application document

3.2. Final Review of Full Application: Finalize the review of the application based on City staff comments and develop a memo summarizing main themes of the suggested revisions.

Deliverables:

- i. Final comments and suggested revisions in the draft application document
- ii. Memo summarizing main themes of suggested revisions



Senate Bill (SB) 35/330 Applications Development

Project Summary

Develop preliminary applications or full applications based on HCD templates and existing jurisdiction-specific documents. Preliminary applications will be consistent with requirements of SB 330 and will be designed to be used for projects seeking streamlined ministerial approval pursuant to SB 35. Full applications will be consistent with SB 35 and jurisdictions' objective policies and procedures.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

- 2.1. **Draft Preliminary Application:** Develop a jurisdiction's SB 35- and 330-compliant residential development preliminary application. The document will be consistent with SB 35 and 330, as well as HCD's template, and will incorporate applicable jurisdiction-specific procedures and policies. The document will additionally be consistent with jurisdiction branding. Prior to drafting the document, the consultant shall review the jurisdiction's municipal code, development application procedures, and approving City staff roles to incorporate applicable procedures and staff roles into the preliminary application. This task assumes two (2) meetings with jurisdiction staff to review the draft preliminary application.

Deliverables:

- i. Draft preliminary application document in Word document format

- 2.2. **Final Preliminary Application:** Finalize the preliminary application based on City staff comments.

Deliverables:

- i. Final preliminary application document in Word document and PDF format

- 3.1. **Draft Full Application:** Develop a jurisdiction's SB 35-compliant residential development preliminary application. The document will be consistent with SB 35 and will incorporate applicable jurisdiction-specific procedures and policies. The document will additionally be consistent with jurisdiction branding. Prior to drafting the document, the consultant shall review the jurisdiction's municipal code, development application procedures, and approving City staff roles to incorporate applicable procedures and staff roles into the application. If any referenced procedures or municipal code sections are not compliant with SB 35, a recommendation for amendments to ensure compliance will be included in the draft document. This task assumes two (2) meetings with jurisdiction staff to review the draft application.

Deliverables:

- i. Draft application document in Word document format

- 3.2. **Final Full Application:** Finalize the application based on City staff comments.

Deliverables:

- i. Final application document in Word document and PDF format



Senate Bill (SB) 35 Promotion and Resources

Project Summary

Assist with SB 35 implementation and promotion at the local jurisdiction level through developing both public- and City staff-facing resources. Resources can include creating the SB 35-mandated list of local submittal requirements for residential development applications, creating an SB 35 webpage on a jurisdiction's website, and creating a user guide for SB 35 streamlining.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Research and Information Gathering:** Research existing and in-progress local SB 35 implementation efforts and procedures to compile information for inclusion in resources to be developed. As part of this research, any efforts or procedures which are required by the development streamlining portions of SB 35 and are not yet underway at the jurisdiction will be noted for City staff. This task also includes time to research peer jurisdiction examples of the resources being developed.

Deliverables:

- i. Memo summarizing implementation efforts and procedures and highlighting any SB 35 streamlining-required efforts which are not yet completed or underway, as well as a list of peer jurisdiction example resources reviewed

- 3.1. **Draft List of Submittal Requirements:** Create a draft checklist list of submittal requirements for residential development applications. The checklist will be consistent with jurisdiction branding and will include local forms as well as certifications and the statement of application as required in SB 35. This task assumes one (1) meeting with jurisdiction staff to review the draft checklist.

Deliverables:

- i. Draft submittal requirement checklist

3.2. **Final List of Submittal Requirements:** Finalize the checklist based on City staff comments.

Deliverables:

- i. Final submittal requirement checklist

4.1. **Draft SB 35 Webpage Content:** Based on expectations discussed in the project kick-off meeting, create draft language, tables, graphics, and/or videos that facilitate easier use of SB 35 streamlined ministerial approval for residential development applications. The draft content may include an explanation of SB 35, the streamlined ministerial review process, timelines, eligibility criteria, program benefits, submittal requirements, and/or other elements discussed with City staff. This task assumes one (1) meeting with jurisdiction staff to review the draft content.

Deliverables:

- i. Draft webpage content in Word document form

4.2. **Final SB 35 Webpage Content:** Finalize the language, tables, graphics, and/or videos based on City staff comments.

Deliverables:

- i. Final webpage content in Word document form and original files of any graphics or videos

5.1. **Draft SB 35 User Guide:** Create a public- and/or City staff-facing guide for using SB 35 streamlined ministerial approval. The user guide will be consistent with jurisdiction branding and will include a program summary, eligibility criteria, a map of eligible parcels, program benefits, timelines, submittal requirements, process diagram, roles and responsibilities, and/or FAQs. This task assumes one (1) meeting with jurisdiction staff to review the draft user guide.

Deliverables:

- i. Draft user guide in Word document exported from InDesign

5.2. **Final SB 35 User Guide:** Finalize the user guide based on City staff comments.

Deliverables:

- i. Final user guide in PDF and Word document exported from InDesign
- ii. All supporting user guide files



Municipal Code Updates

Project Summary

Identify and/or address updates to a jurisdiction's municipal code necessitated by recent state housing legislation. This project involves reviewing existing municipal code language, including the jurisdiction's draft or adopted 6th Cycle Housing Element for legally necessitated programs related to municipal code updates to create a matrix of specific sections that require both updates and conformance amendments and the justification for amendment. If a municipal code amendment is required by recent state housing legislation but not identified as a program in the housing element, this amendment will be included in the matrix. An optional task entails writing the language of the amendments.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.
Deliverables:
 - i. Kick-off meeting summary
 - ii. Monthly invoices and summaries
2. **Review Existing Municipal Code:** Review existing municipal code, including jurisdiction's draft or adopted 6th Cycle Housing Element to identify municipal code update programs necessitated by recent state housing legislation. Conduct up to two (2) focused interviews with jurisdiction staff and/or stakeholders, and summarize all findings and resulting recommendations into a summary memo.
Deliverables:
 - i. Memo summarizing findings and recommendations of municipal code review and staff/stakeholder focused interviews
3. **Legislation Research:** Review recent state housing legislation to identify any resulting required municipal code amendments that are not identified in the housing element. This research can include up to ten (10) pieces of legislation, including (but not limited to) AB 2162, AB 101, SB 166, SB 35, SB 330, and/or SB 478.
Deliverables:
 - i. Memo stating elements of legislation that were not addressed in the housing element but must be addressed in a municipal code update

4. **Municipal Code Amendment Matrix:** Compile a matrix of necessary municipal code amendments. The matrix will include the municipal code section number, title, subject, brief justification of why an amendment is needed, source legislation, and related housing element program, if applicable.

Deliverables:

- i. Matrix of necessary municipal code amendments

5. **Optional: Develop Municipal Code Updates:** Prepare municipal code amendments in a Word document with Track Changes in three phases: initial draft municipal code amendments, draft municipal code amendments for public review (if outreach is being conducted), and final municipal code amendments for adoption. Each amendment will have a corresponding comment summarizing the amendment, providing justification for the amendment, and providing the date it was written. To accompany the in-text suggested amendments, the matrix from Task 4 will be expanded upon to include the type of amendment suggested, the date of the amendment, and any relevant notes. This task assumes up to six (6) meetings with jurisdiction staff to review the initial draft, public review draft, and final amendments.

Deliverables:

- i. Draft municipal code amendment text, including comments, in Word document form
- ii. Draft municipal code amendment text for public review, including comments, in Word document form (optional)
- iii. Final municipal code amendment text for adoption, including comments, in Word document form

6. **Optional: Outreach and Engagement:** Support, facilitate, and summarize comments collected throughout the municipal code amendment process including up to two (2) public workshops (or similar method), two (2) focused sessions with a deliberative body, and up to two (2) presentations to a deliberative body. All materials will be provided to jurisdiction staff for documentation and use.

Deliverables:

- i. Prep materials, presentations, and meeting summaries from all outreach and engagement activities



Density Bonus Law User Guide

Project Summary

Creating a Density Bonus Law user guide for public and/or City staff use. The user guide will serve as a resource for projects using state Density Bonus incentives for constructing affordable housing units and will make clear what opportunities and commitments are involved. The user guide will be based on adopted Density Bonus law as of December 31, 2021.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Compile a matrix with information related to state Density Bonus Law eligibility, incentives, concessions, City and applicant obligations, timelines, and application processes. Research examples of Density Bonus Law user guides from peer jurisdictions and make note of key differentiators among them. This task assumes two (2) meetings with jurisdiction staff; one (1) meeting to review the matrix; and one (1) meeting to discuss the peer jurisdiction user guides, establish elements from them that will be used as models for the draft user guide, and discuss visioning for the draft user guide. Additionally, this task includes up to one (1) focused discussion with key stakeholders to identify specific items where additional resources or support is needed within the guide.

Deliverables:

- i. Matrix detailing Density Bonus Law eligibility, incentives, concessions, City and applicant obligations, timelines, and application processes
- ii. Meeting notes from jurisdiction and stakeholder meetings

3. **Draft Density Bonus Law User Guide:** Create a public- and/or City staff-facing guide for using state Density Bonus Law. The user guide will be consistent with jurisdiction branding and will include a program summary, eligibility criteria, program benefits, incentives, concessions, City and applicant obligations, timelines, submittal requirements, process diagram, roles and responsibilities, and/or FAQs. This task assumes one (1) meeting with jurisdiction staff to review the draft user guide.

Deliverables:

- i. Draft user guide in Word document exported from InDesign
- 4. **Final SB 35 User Guide:** Finalize the user guide based on City staff comments.

Deliverables:

- i. Final user guide in PDF and Word document exported from InDesign
- ii. All supporting user guide files

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Municipal Code Revision: Density Bonus Law

Project Summary

Revise the jurisdiction's municipal code to incorporate recent state Density Bonus Law updates and reaffirm the jurisdiction's codified commitment to facilitating affordable housing development. This project involves adding direct language of California's density bonus program into the municipal code in place of references to Government Code sections, as well as revising the municipal code to ensure no items are out of date or out of compliance with current Density Bonus Law.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Municipal Code Update Matrix:** Review the jurisdiction's municipal code and create an Excel matrix of current language related to density bonus that requires revisions pursuant to Density Bonus Law eligibility, incentives, concessions, City and applicant obligations, timelines, and application processes. The matrix will include the municipal code section number, title, subject, brief justification of why an amendment is needed, and source legislation. This task assumes one (1) meeting with jurisdiction staff to review items identified in the matrix.

Deliverables:

- i. Matrix of current language in the jurisdiction's municipal code related to density bonus that requires revisions

3. **Draft Municipal Code Amendments:** Prepare draft municipal code amendments in a Word document with Track Changes. The amendments will center both on updates to remain consistent with density bonus legislation, as identified in the matrix from Task 2, and adding language from Density Bonus Law directly into the municipal code. Each amendment will have a corresponding comment summarizing the amendment, providing justification for the amendment, and providing the date it was written. To accompany the in-text suggested amendments, the matrix from Task 2 will be expanded upon to include the type of amendment suggested, the date of the



amendment, and any relevant notes. This task assumes one (1) meeting with jurisdiction staff to review the draft amendments.

Deliverables:

- i. Draft amendment text, including comments, in Word document form
4. **Final Municipal Code Amendments:** Finalize the amendment text, matrix, and any comments.

Deliverables:

- i. Final amendment text, including comments, in Word document form
- ii. Final matrix of amendments

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Surplus Land Act Implementation Assistance

Project Summary

Provide implementation assistance for activities related to the Surplus Land Act, with particular focus on changes to Government Code section 54222 enacted by Assembly Bills (AB) 1255 and 1486. Available assistance includes creating a surplus lands disposition user guide; helping provide the legally required noticing for surplus land disposition; and inventorying a jurisdiction's surplus land for the annual HCD submittal.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

- 2.1. **User Guide Information Gathering:** Compile a matrix with information related to surplus land law applicability, required City actions and deliverables, disposition requirements, development applicant requirements, timelines, and development application processes. Research examples of Surplus Land Act user guides from peer jurisdictions and make note of key differentiators among them. This task assumes two (2) meetings with jurisdiction staff; one (1) meeting to review the matrix and one (1) meeting to discuss the peer jurisdiction user guides, establish elements from them that will be used as models for the draft user guide, and discuss visioning for the draft user guide.

Deliverables:

- i. Matrix detailing Surplus Land Act applicability, required City actions and deliverables, disposition requirements, development applicant requirements, timelines, and development application processes

- 2.2. **Draft Surplus Land Act User Guide:** Create a public- and/or City staff-facing guide for using the Surplus Land Act. The user guide will be consistent with jurisdiction branding and will include a program summary, applicability, program benefits, required City actions and deliverables, disposition requirements, development applicant requirements, timelines, process diagram, roles and responsibilities, and/or FAQs. This task assumes one (1) meeting with jurisdiction staff to review the draft user guide.

Deliverables:

- i. Draft user guide in Word document exported from InDesign

2.3. Final Surplus Land Act User Guide: Finalize the user guide based on City staff comments.

Deliverables:

- i. Final user guide in PDF and Word document exported from InDesign
- ii. All supporting user guide files

3. Surplus Land Disposition Noticing: Create a memo outlining the noticing procedures that are legally required of a jurisdiction seeking to dispose of surplus land and indicate which noticing procedures the jurisdiction is required to provide for each parcel being disposed of. Draft and finalize the Notice of Availability documents and compile a list in Excel of who the Notice of Availability must be sent to. This task assumes developing Notices of Availability for up to ten (10) parcels and two (2) meetings with jurisdiction staff: one meeting to review the memo of noticing procedures and discuss visioning for draft Notices of Availability; and one meeting to review the draft Notices of Availability.

Deliverables:

- i. Memo outlining noticing procedures for disposing of surplus land and indicating which noticing procedures are required for each parcel
- ii. Excel list stating contacts each parcel's Notice of Availability must be sent to
- iii. Up to ten (10) draft Notices of Availability
- iv. Up to ten (10) final Notices of Availability

4. Surplus Land Inventory: Using data from City staff, conduct the inventory of a jurisdiction's surplus land for the required annual April 1 submission to HCD pursuant to AB 1255. The inventory will include a public-facing jurisdiction-wide map illustrating where the surplus land parcels are and an Excel spreadsheet including a description of each parcel and its existing use, APN, address, each parcel's designation of either surplus land or exempt surplus land, and size.

Deliverables:

- i. Public-facing, jurisdiction-wide map illustrating where surplus land parcels are
- ii. Excel spreadsheet with a description of each surplus land parcel and its existing use, APN, address, each parcel's designation of either surplus land or exempt surplus land, and size



Senate Bill (SB) 9 User Guide

Project Summary

Creating a SB 9 user guide for public and/or City staff use. The user guide will serve as a resource for projects using SB 9 for lot split or to develop two units on a parcel zoned as single-family residential. The guide will make clear what opportunities and commitments are involved, as well as the bill's interaction with related legislation and municipal code specifications, such as objective design standards and existing zoning. The user guide will be based on the adopted bill as of December 31, 2021.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Compile a matrix with information related to SB 9 eligibility, City and applicant obligations, timelines, application processes, and prominent implementation and/or applicability questions that have been raised to date. Research examples of SB 9 user guides from peer jurisdictions and/or land use law firms and make note of key items from them. This task assumes one (1) meeting with jurisdiction staff to review the matrix and highlight notable items from the peer jurisdiction and/or land use law firm research, and to discuss visioning for the draft user guide.

Deliverables:

- i. Matrix detailing SB 9 eligibility, City and applicant obligations, timelines, application processes, and prominent implementation and/or applicability questions that have been raised to date

3. **Draft SB 9 User Guide:** Create a public- and/or City staff-facing guide for using SB 9 for lot split or to develop two units on a parcel zoned as single-family residential. The user guide will be consistent with jurisdiction branding and will include a program summary, eligibility criteria, a map of eligible parcels, program benefits, City and applicant obligations, timelines, submittal requirements, process diagram, roles and responsibilities, and/or FAQs. This task assumes one (1) meeting with jurisdiction staff to review the draft user guide.

Deliverables:

- i. Draft user guide in Word document exported from InDesign
- 4. **Final SB 9 User Guide:** Finalize the user guide based on City staff comments.

Deliverables:

- i. Final user guide in PDF and Word document exported from InDesign
- ii. All supporting user guide files

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Development Application Approvals and Timelines Guide

Project Summary

Create a guide to serve as an informational resource for City staff and/or the public about state-mandated residential development application approval stipulations and timelines. This guide will provide information for the following key focus areas: which projects are eligible for streamlined ministerial approval pursuant to state legislation, state-mandated reasons for why a jurisdiction may not disprove a development application processed ministerially, state-mandated timelines for jurisdictions to approve a development application and any new requirements or standards jurisdictions are prohibited from imposing on a development while the application is being processed, and state-mandated development application expiration timelines.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Gather information for the guide related to relevant residential development state legislation and implementation resources, focusing on eligibility for state-mandated streamlined ministerial approval, reasons for why a jurisdiction may not disprove a development application processed ministerially, state-mandated timelines for development application approvals and prohibitions on applying newly adopted requirements or standards, and state-mandated timelines for development application expiration. Examples of implementation resources include guides produced by HCD, land use law firms, peer jurisdictions, consultants. Create a memo that lists all legislation and other sources information presented in the guide will come from. This task assumes one (1) meeting with jurisdiction staff to review the sources consulted and discuss visioning for the draft guide.

Deliverables:

- i. Memo outlining the legislation items and other sources with information to be incorporated into the guide

3. **Draft Guide:** Create a public- and/or City staff-facing guide for understanding state-mandated residential development application approvals and timelines. The guide will be consistent with jurisdiction branding and will include sections about the following focus areas: which projects are eligible for streamlined ministerial approval pursuant to state legislation, state-mandated reasons for why a jurisdiction may not disprove a development application processed ministerially, state-mandated timelines for jurisdictions to approve a development application and any new requirements or standards jurisdictions are prohibited from imposing on a development while the application is being processed, and state-mandated development application expiration timelines. This task assumes one (1) meeting with jurisdiction staff to review the draft guide.

Deliverables:

- i. Draft guide in Word document exported from InDesign

4. **Final Guide:** Finalize the guide based on City staff comments.

Deliverables:

- i. Final guide in PDF and Word document exported from InDesign
- ii. All supporting guide files



Senate Bill (SB) 10 Ordinance

Project Summary

Create a jurisdiction's SB 10 ordinance, including the map of parcels subject to the ordinance. This ordinance would, consistent with SB 10, allow for any parcel to be zoned for up to 10 dwelling units per acre if it is located in a transit-rich area or an urban infill site.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Compile a matrix with information related to SB 10 focusing on applicability, definitions, parcel eligibility, jurisdiction obligations, implications, ordinance approval stipulations, and prominent implementation and/or applicability questions that have been raised to date. Identify implementation resources such as guides published by HCD, land use law firms, or peer jurisdictions, and examples of SB 10 ordinances from peer jurisdictions, and make note of key items from them.

Deliverables:

- i. Matrix detailing SB 10 applicability, definitions, parcel eligibility, jurisdiction obligations, implications, ordinance approval stipulations, and prominent implementation and/or applicability questions that have been raised to date
3. **Local Information Review and Parcel Identification:** Review the jurisdiction's zoning code, zoning map, applicable specific plans, and affirmatively furthering fair housing programs, as well as transit route maps, to gather information on existing zoning and transit routes. Compile a map of transit-rich areas, as defined in SB 10. Review parcel land use and development data to compile a city-wide map of urban infill sites, as defined in SB 10. Compile one composite map with both all urban infill sites and all parcels in transit-rich areas to serve as a base map from which to select areas subject to the ordinance. This task assumes three (3) meetings with jurisdiction staff to coordinate data gathering, review the maps, and discuss visioning for the draft ordinance.

Deliverables:

- i. Map of city-wide urban infill sites, as defined in SB 10
- ii. Map of city-wide parcels in transit-rich areas, as defined in SB 10
- iii. Map of city-wide urban infill sites and parcels in transit-rich areas, as defined in SB 10

4. **Stakeholder Meetings:** Meet with stakeholders, such as affordable housing developers, market-rate housing developers, supportive housing nonprofit agencies, and staff from peer jurisdictions with adopted SB 10 ordinances. During these meetings, engage stakeholders to discuss elements of the ordinance that would be successful in facilitating more housing construction, density amounts that are economically feasible in the local context, anti-displacement strategies, and barriers to development that the SB 10 ordinance has the potential to address. This task assumes five (5) stakeholder meetings.

Deliverables:

- i. Meeting summaries

5. **Draft Ordinance and Parcel Map:** Create a draft SB 10 ordinance and map of parcels subject to the ordinance. When developing the ordinance, ensure that any increased authorized density is consistent with the jurisdiction's obligation to affirmatively further fair housing through programs established in the housing element. This task assumes four (4) meetings with jurisdiction staff to discuss visioning for the draft ordinance.

Deliverables:

- i. Draft SB 10 ordinance and applicable parcels map

6. **Final Ordinance and Parcel Map:** Finalize the ordinance and map of parcels subject to it.

Deliverables:

- i. Final SB 10 ordinance and applicable parcels map
- ii. All supporting GIS files

7. **Consistency with Affirmatively Furthering Fair Housing Obligations:** Formalize findings that the increased density authorized by the ordinance is consistent with the jurisdiction's obligation to affirmatively further housing through programs established in the housing element. These findings shall be compiled such that they may be used by the legislative body adopting the zoning ordinance to comply with SB 10.

Deliverables:

- i. Memo outlining sources reviewed



Development Application Review

Project Summary

Assist jurisdiction staff in reviewing residential development applications. These development applications may be processed through ministerial or discretionary review. The consultant will serve in a staff augmentation role to assist with and carry out activities with which jurisdiction staff would benefit from extra staff capacity.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Staff Training:** Participate in up to three (3) training sessions with jurisdiction staff. During these training sessions, jurisdiction staff will review the local residential development application approval process and will demonstrate the steps using two recently approved development examples. If available, one example shall have been approved ministerially and one shall have been approved through discretionary design review. Jurisdiction staff will also share with the consultant any internal guide materials outlining approval processes, timelines, requirements, and best practices. The consultant shall review the guide materials, the zoning (or other equivalent) section of the jurisdiction's municipal code, the development application instructions (or other equivalent) page(s) on the jurisdiction's website, and the required application forms.

Deliverables:

- i. Participation in up to three (3) training sessions with jurisdiction staff

3. **Ministerial Review Activities:** Assist jurisdiction staff with carrying out activities related to processing a development application ministerially. These activities can include, but are not limited to: determining if applications are complete; determining if required fees have been paid; checking consistency with adopted municipal code policies, city-wide design guidelines and standards, and objective design standards; verifying application information; developing design guidance/recommendation reports, and providing the applicant with any noticing. Services include providing written comments to applicant. Up to one (1) meeting will be held with applicant.

Deliverables:

- i. Assistance with ministerial review activities for up to 315 hours

4. **Discretionary Design Review Activities:** Assist jurisdiction staff with carrying out activities related to processing a development application through discretionary design review. These activities can include, but are not limited to: determining if applications are complete; determining if required fees have been paid; checking consistency with adopted municipal code, policies, city-wide design guidelines and standards, and any other regulatory planning documents; providing written comments to the applicant, developing materials and attendance at interdepartmental review sessions and/or Planning Commission or Design Review Board meetings such as staff reports, agendas, and/or meeting minutes; creating public-facing notices and/or materials related to the proposed development; verifying application information; providing the applicant with any noticing; related research; coordinating scheduling meetings; and developing design guidance/recommendation reports. Services include up to two (2) meetings with the applicant.

Deliverables:

- i. Assistance with discretionary design review activities for up to 651 hours



Accessory Dwelling Unit (ADU) FAQ and Construction Process User Guide

Project Summary

Create an FAQ document and construction process user guide for ADUs. This document will respond to recent state ADU legislation as well as the jurisdiction's municipal code to create a resource that property owners can use to assist them in understanding the opportunities, considerations, and processes involved in constructing an ADU/JADU. An optional task involves holding office hours for community members to engage directly with consultant and/or jurisdiction staff about ADU construction; the consultant will facilitate a learning process so that jurisdiction staff are well equipped to continue the office hours program after the project concludes.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Compile a matrix with information related ADU legislation, focusing on state-mandated design standard limitations, City and applicant obligations, allowable zones, differences between ADUs and JADUs, timelines, application processes, and prominent implementation and/or applicability questions that have been raised to date. Review the jurisdiction's municipal code to identify current (legally compliant) language and regulations related to ADUs. If language and regulations which are not legally compliant are identified, the consultant will notify jurisdiction staff. Research examples of ADU FAQ or construction process user guides from peer jurisdictions and/or land use law firms and make note of key items from them. This task assumes one (1) meeting with jurisdiction staff to review the matrix and highlight notable items from the peer jurisdiction and/or land use law firm research, and to discuss visioning for the draft user guide.

Deliverables:

- i. Matrix detailing ADU state-mandated design standard limitations, City and applicant obligations, allowable zones, differences between ADUs and JADUs, timelines, application processes, and prominent

implementation and/or applicability questions that have been raised to date

3. **Draft ADU FAQ and Construction Process User Guide:** Create a public- and/or City staff-facing guide to address common questions about ADUs and clearly outline the construction process in the local context. The user guide will be consistent with jurisdiction branding and will include an introduction, FAQ section, a map of eligible parcels for ADU/JADU construction, step-by-step instructions for navigating the application, approval, and construction process, mandatory design standards, City and applicant obligations, timelines, process diagram, and/or roles and responsibilities. This task assumes one (1) meeting with jurisdiction staff to review the draft user guide.

Deliverables:

- i. Draft user guide in Word document exported from InDesign

4. **Final ADU FAQ and Construction Process User Guide:** Finalize the user guide based on City staff comments.

Deliverables:

- i. Final user guide in PDF and Word document exported from InDesign
- ii. All supporting user guide files

5. **ADU Office Hours:** Hold virtual office hours for community members to ask questions about ADUs/JADUs. These office hours will be held weekly for 8 weeks. A jurisdiction staff member shall be present for at least the last 4 office hours to observe and learn so that they will be equipped to continue hosting ADU office hours after the project is complete.

Deliverables:

- i. 8 office hour 1-hour sessions



Transit Priority Area (TPA) Mapping and FAQ Document

Project Summary

Create city-wide maps and geospatial files of TPAs that both developers and jurisdiction staff can use to facilitate housing development in areas with transit accessibility. To support using these maps in context, the consultant will create an FAQ document with information about opportunities, incentives, and development streamlining that are possible through state legislation when developing housing in TPAs.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Legislation and Implementation Review:** Compile a matrix with information related to TPA legislation, focusing on definitions, development opportunities and incentives, development affordability requirements, City and development applicant obligations, and development application processes. Review TPA development user guides and FAQ documents produced by HCD, land use law firms, and peer jurisdictions. Additionally, review the jurisdiction's municipal code for any information related to TPAs. Gather and review information about local transit routes and stops and gather contextual geospatial files with features that will also be shown on the TPA map, for example the jurisdiction boundary, parks, water bodies, roads, parcels, etc. Compile a memo that lists all sources reviewed. This task assumes one (1) meeting with jurisdiction staff to review the source list and highlight notable items from the peer jurisdiction example research, and to discuss visioning for the draft FAQ document.

Deliverables:

- i. Matrix detailing TPA legislation, focusing on definitions, development opportunities and incentives, development affordability requirements, City and development applicant obligations, and development application processes
- ii. Memo outlining sources reviewed

3. **TPA File and Map Creation:** Using local transit route information and files, create geospatial files (shapefiles and KMZs) of all TPAs within the jurisdiction. Compile a

draft and final map of city-wide TPAs for both public and jurisdiction staff use. This task assumes one (1) meeting with jurisdiction staff to review the draft map and provide comments for revision.

Deliverables:

- i. Draft TPA map
- ii. Final TPA map
- iii. Shapefiles and KMZs of all TPAs within the jurisdiction

4. **Draft FAQ Document:** Develop a draft document that serves as an FAQ resource about residential development in TPAs for public and jurisdiction staff use. The document will be consistent with jurisdiction branding and will address key topics such as definitions, development opportunities and incentives, development affordability requirements, City and development applicant obligations, roles and responsibilities, and/or process diagram. This task assumes one (1) meeting with jurisdiction staff to review the draft FAQ document.

Deliverables:

- i. Draft TPA FAQ document

5. **Final FAQ Document:** Finalize the FAQ document based on City staff comments.

Deliverables:

- i. Final TPA FAQ document

Development Impact Fee (DIF) Structure Review

Project Summary

Cities charge development impact fees (DIF) for the development of amenities and infrastructure and are necessary to continue to administer existing programs and support other development services to ensure the health, safety, and welfare of the community. However, DIF can be a barrier to development and home prices. This project involves revising the current fee structure to change the unit of measurement for DIF from number of units to square footage to encourage the production of additional housing units. Additionally, an impact fee nexus study will be prepared in accordance with AB 602 to justify the increase or development of fees and establish transparency and accountability standards.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Existing Development Impact Fee Structure Review:** Review and assess the existing development impact fee structure and make recommendations for changes or additions if applicable.

Deliverables:

- i. Memo outlining initial findings and recommendations

3. **Data Collection and Best Practices:** Collect necessary data and develop additional data required to fully support a development impact fee unit of measurement change. Additionally, strategies of impact fees implemented in other jurisdictions will be reviewed and recommendations will be provided where applicable.

Deliverables:

- i. Memo outlining findings and best practices summary

4. **Impact Fee Nexus Study:** Prepare and provide a report that provides the legal nexus between fee recommendations and new development. The report must include



relevant findings, supporting justification, and recommended impact fees. The report shall meet all the requirements of the California Mitigation Fee Act.

Deliverables:

- i. Impact fee/nexus study in Word document form
5. **Draft Development Impact Fees Structure:** Prepare draft development impact fees structure amendments and recommendations in a Word document with Track Changes. Provide draft Excel worksheet to allow for future fee updates. Review all calculations and fee study methodology with City staff.

Deliverables:

- i. Draft development impact fees structure text, including comments, in Word document form
 - ii. Draft Excel worksheet for future fee updates
6. **Final Development Impact Fees Structure:** Finalize development impact fees structure in a Word document with Track Changes. Provide final Excel worksheet to allow for future fee updates.

Deliverables:

- i. Final development impact fees structure text, including comments, in Word document form
- ii. Final Excel worksheet for future fee updates



Prohousing Designation

Project Summary

Assist a jurisdiction obtain HCD's Prohousing designation through the Prohousing Designation Program. Obtaining this designation can yield additional points or other preference in the scoring of a jurisdiction's applications for competitive housing and infrastructure programs.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.

Deliverables:

- i. Kick-off meeting summary
- ii. Monthly invoices and summaries

2. **Research and Information Gathering:** Compile a matrix with information related to the Prohousing Designation Program, focusing on its benefits, jurisdiction obligations, eligibility, the application process and requirements, key dates, and implications. Watch the Application Workshop recording available on HCD's website and review the accompanying How to Apply document. Create a checklist of information required in the application package which the jurisdiction has readily available as well as information that will require additional research. Coordinate with jurisdiction staff to gather any information not initially readily available. This task assumes two (2) meetings with jurisdiction staff to review the information gathered and plan for gathering additional information.

Deliverables:

- i. Matrix detailing Prohousing Designation Program benefits, jurisdiction obligations, eligibility, the application process and requirements, key dates, and implications
- ii. Checklist of information required in the Prohousing Designation Program application package which is readily available as well as information that will require additional research

3. **Prohousing Designation Application Package Support:** Complete the Prohousing Designation application package, including all appendices, using information gathered in Task 2. Coordinate with HCD Prohousing Designation Program technical assistance team as needed. This task assumes three (3) meetings with jurisdiction staff



to review the application package and coordinate revisions or additional information requests.

Deliverables:

- i. Completed Prohousing Designation application package
4. **Prohousing Designation Application Package Response:** Address feedback provided by HCD after initial application submission in order to achieve approval. This task assumes one (1) meeting with HCD to review the feedback and two (2) meetings with jurisdiction staff to coordinate addressing the feedback.

Deliverables:

- i. Revised Prohousing Designation application package

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Community Engagement

Project Summary

This project entails meaningfully and purposefully engaging with community members and stakeholders to add value and address community needs related to the projects in this workplan. Each form of outreach and engagement in this project's tasks may be used separately or may be combined with others for more comprehensive engagement. Jurisdictions will select which engagement form(s) to use.

Scope of Work

1. **Project Coordination and Task Order Management:** Set up project and hold a virtual kick-off meeting with City staff to assess their needs, priorities, vision, schedule expectations, etc. Includes preparation time for the meeting and writing a summary. Prepare invoices and summaries.
Deliverables:
 - i. Kick-off meeting summary
 - ii. Monthly invoices and summaries
2. **Virtual Community Workshop:** Facilitate an interactive virtual workshop that educates community members about the project and seeks their input. The workshop's format may include a presentation led by the consultant, live polling, breakout room sessions with an interactive participant-focused activity, a report back to the whole group if breakout sessions take place, Q&A, and/or closing remarks and next steps. Consultant will prepare a community workshop plan, outreach flyer (in English and Spanish), PowerPoint presentation, and workshop summary for posting on the jurisdiction's website. This task assumes up to four (4) meetings with jurisdiction staff to plan for the workshop.
Deliverables:
 - i. Community outreach plan
 - ii. Outreach flyer offered in both English and Spanish
 - iii. PowerPoint presentation offered in both English and Spanish
 - iv. Workshop summary
 - v. Interactive activity materials (optional)
3. **In-Person Community Workshop:** Facilitate an interactive in-person workshop that educates community members about the project and seeks their input. The workshop will adhere to all applicable local, state, and federal COVID-19 requirements and will follow COVID-19 recommendations as agreed upon by jurisdiction staff and the consultant team. The workshop's format may include a presentation led by the

consultant, activity boards, and/or smaller group discussion and Q&A. Activity boards and other interactive elements of the workshop will additionally be digitally adapted for posting on the jurisdiction's website so those unable to attend the in-person workshop may participate in the community engagement effort. Consultant will prepare a community workshop plan, outreach flyer (in English and Spanish), PowerPoint presentation, and workshop summary for posting on the jurisdiction's website. This task assumes up to five (5) meetings with jurisdiction staff to plan for the workshop.

Deliverables:

- i. Community outreach plan
 - ii. Outreach flyer
 - iii. Workshop summary
 - iv. Online versions of in-person activities in both English and Spanish
 - v. Activity boards (optional)
 - vi. PowerPoint presentation (optional)
4. **Stakeholder Interviews/Focus Groups:** Conduct interviews with key stakeholders to gather industry- and experience-specific insight related to the project and/or solicit feedback about best practices and project elements. These focus group interviews may include one stakeholder per meeting or multiple stakeholders grouped by similar mission and/or sector. This task assumes that jurisdiction staff will provide names and contact information of stakeholders. A list of questions to be asked during each interview will be prepared; this list may be internal- or external-facing based on jurisdiction staff direction and may be distributed in advance to the stakeholders if directed. A summary of findings from all interviews conducted will be prepared. This task assumes one (1) meeting with jurisdiction staff before the interviews commence and up to two (2) interviews.

Deliverables:

- i. Stakeholder interview meeting questions for each meeting
 - ii. Up to two (2) stakeholder interview meeting summaries
 - iii. Summary of findings from stakeholder interviews
5. **Office Hours:** Hold virtual office hours to engage with community members and stakeholders about the project. Assist developing advertising materials for jurisdiction staff to distribute. During office hours, consultant staff will be available over phone, email, and Microsoft Teams (or equivalent) to answer questions from the public about the project and receive feedback. Compile a document summarizing questions asked and feedback received during all office hour sessions. This task assumes one (1) meeting with jurisdiction staff before the office hours commence and up to two (2)



office hour sessions. Jurisdiction staff may request interpretation services to be accessible during office hours.

Deliverables:

- i. Summary of questions asked and feedback received during office hour sessions

6. **Online Interactive Activity:** Prepare a web-based interactive activity for community members to participate in to provide feedback about the project. The activity may be mapping-based, forum-based, survey-based, scenario-based, or a combination thereof. The activity will be set up in English and Spanish. When the feedback collection period has ended and the activity is closed, prepare an analytical summary of results.

Deliverables:

- i. Interactive web-based activity
- ii. Summary of interactive activity results



Western Riverside Council of Governments Planning Directors Committee

Staff Report

Subject: Objective Design Standards Toolkit Summary
Contact: Christopher Tzeng, Program Manager, ctzeng@wrcog.us, (951) 405-6711
Date: December 9, 2021

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide a summary of the preparation of an Objective Design Standards Toolkit for use by WRCOG member agencies.

Background:

WRCOG is proposing to utilize Regional Early Action Planning grant funding to prepare an Objective Design Standards Toolkit for use by member agencies in order to implement the requirements of Senate Bill 35. The Toolkit will be developed in a manner so that member agencies can customize standards that fit each agency. The Toolkit is being proposed to include the following components and unique chapters:

- Introduction to SB35 and ODS
- Inclusion in the Zoning Code
- Typical ODS Standards Components
 - Site Development Standards
 - Landscape Design Standards
 - Building Design Standards
 - Architectural Style Standards

This item is reserved for the project team to provide an overview of the Toolkit components. This item is brought forth so that Committee members can provide feedback on the attached proposed Scope of Work.

Prior Action(s):

March 1, 2021: The Executive Committee authorized the Executive Director to execute an MOU, substantially as to form, with SCAG for the REAP Subregional Partnership Program.

Fiscal Impact:

Transportation and Planning Department activities are included in the Agency's adopted Fiscal Year 2021/2022 Budget under the Transportation Department. In addition, the development of the Toolkit is

covered by REAP funding that has already been approved by SCAG.

Attachment(s):

[Attachment 1 - Objective Design Standards Proposal](#)

November 17, 2021

Chris Tzeng
Program Manager
Western Riverside Council of Governments

Subject: Proposal to Prepare Multifamily Objective Design Standards Toolkit

Dear Chris:

It is with pleasure that we submit our proposal to prepare Objective Design Standards (ODS) Toolkit for multifamily projects for use by WRCOG member cities. Based on our prior conversations, we understand that the Toolkit will be used to assist member cities to develop customized tools to implement the requirements of SB35. Based on our prior experience working with individual cities creating their Objective Design Standards, we recommend that the Toolkit include the following components and unique chapters:

- Introduction to SB35 and ODS
- Inclusion in the Zoning Code
- Typical ODS Standards Components
 - Site Development Standards
 - Landscape Design Standards
 - Building Design Standards
 - Architectural Style Standards

This Toolkit will be designed to gather best practices from recently adopted ODS documents and ordinances and identify specific standards that local jurisdictions can customize as needed to adjust to their unique geography.

Below is our proposed scope of work to prepare this Toolkit.

Scope of Work

Task 1. Project Management

PlaceWorks will produce an agenda and attend a project kick-off meeting with WRCOG staff to clarify overall project objectives, establish communication protocols, and calendar key dates for project deliverables and outreach meetings.

At the kick-off meeting we will also establish the date and time for a standing project team meeting in order to maintain regular communication. We find that a bi-weekly schedule works well, with public-facing meetings held on alternating weeks as needed. This schedule allows Agency Staff at least a one-week preview of draft presentations prior to public meetings, and PlaceWorks a week to make necessary revisions. We have anticipated a schedule of approximately 6 months to execute this work.

Task 1 Deliverables:

- Kick-Off Meeting Agenda
- Revised Project Schedule
- Bi-Weekly Meeting Agendas

Task 2. Objective Design Standards Toolkit

The proposed Toolkit will be organized into the following chapters:

2.1. Introduction to SB35 and ODS

This introductory chapter will discuss SB35 and the requirements of “Objective Development Standards” as established by SB35.

2.2 Inclusion in the Zoning Code

The Toolkit will assume that the typical means of implementing ODS will be a stand-alone illustrated ODS document, empowered by appropriate reference within the local jurisdiction’s Municipal Code. This chapter will discuss typical means of enacting ODS through strategic amendments to the Municipal Code, providing boilerplate language and identifying common Code sections for such amendments.

2.3 Site Planning Standards

This chapter will address common standards and considerations related to overall site design, for both infill structures on existing lots and new “greenfield” development, including:

- Lot layout, building orientation, grading and drainage, access and circulation (including complete streets on private property), parking, and open space requirements.
- Utilitarian Elements such as garage design and placement; ancillary structures, utilities, walls and fences, trash enclosures, solar carports and lighting.

2.4 Landscape Standards

Typical standards related to landscape architecture, such as gateway signs, fencing, play areas, planting, irrigation and water conservation, and compliance with relevant ordinances, will be detailed in this chapter.

2.5 Building Design Standards

This chapter will detail typical standards for general building design topics, such as form, massing, height, articulation, entry locations, garage location, and adjustments to adjacent uses.

2.6 Architectural Style Standards

In the context of compliance with SB35, architectural styles are not necessary. However, in our experience many communities desire the inclusion of architectural style within their Design Standards. To accommodate this desire, PlaceWorks will prepare cut-sheets for architectural styles. The cut-sheets will identify key attributes of each style and include example imagery appropriate to the WRCOG area. These cut-sheets and associated design standards will be as optional “add-ons” to the overall ODS Toolkit.

We will detail design standards for each architectural style covering building form, building materials, finishes (stucco, brick, stone, etc...) light fixtures, roof pitch, compatible garage door designs, windows, doors, entries, articulation, materials, and colors. Based on our recent experience in the WRCOG area, we recommend that the initial list of styles include:

- Spanish Revival
- Craftsman

- Tuscan
- East Coast Traditional
- Farmhouse
- Modern
- Western

Task 2 Deliverables:

- Administrative Draft Objective Design Standards Toolkit (for WRCOG staff review)
- Draft Objective Design Standards Toolkit (for public review)
- Final Objective Design Standards Toolkit

Task 3. Public Outreach

PlaceWorks will participate in up to five public meetings to present and discuss the Objective Design Standards with WRCOG stakeholders. We have assumed that these meetings will principally be with the WRCOG's Planning Directors Committee, and that our participation will be via online (Zoom or GoTo Meeting) formats.

Task 3 Deliverables:

- Presentation and meeting material for up to five public meetings
- Summary notes for the meeting

Task 4. Local Customization (Optional)

We understand that a selected number of WRCOG member cities may desire to customize the Toolkit material into Objective Design Standards that can be adopted locally. We have budgeted 160 total staff hours to modify the Toolkit standards and graphics to create a document customized to local jurisdictions. This customization scope will include updating illustrative photographs to include local precedents. We anticipate in this task up to 4 meetings with local planning staff to review draft products. The scope does not include supporting local staff in outreach meetings or required adoption hearings.

Task 4 Deliverables:

- Attendance at up to four meetings with local agency planning staff
- Draft Objective Design Standards, customized to local needs
- Final Objective Design Standards, customized to local needs

Proposed Schedule

The basic Toolkit can be completed within a 3- to 6-month timeframe, depending on the scheduling of meetings and approval process within WRCOG organization. We understand the WRCOG's desire to initiate this project in December 2021, and therefore assume the following dates for initial presentations:

Planning Directors Committee – December 9, 2021

Planning Directors Committee – January 13, 2022

Local customization may take an additional 3- to 6-months depending upon the number of meetings the local city staff requires.



Western Riverside Council of Governments Planning Directors Committee

Staff Report

Subject: Housing Legislation Priorities
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: December 9, 2021

Requested Action(s):

1. Receive and file.
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Purpose:

The purpose of this item is to discuss housing legislative priorities for WRCOG.

Background:

This item is reserved to discuss housing legislative priorities the Committee would like WRCOG to bring forth to the Legislature on-behalf of the jurisdictions in Western Riverside County.

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact.

Attachment(s):

None.