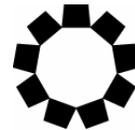


ASSOCIATION OF BAY AREA GOVERNMENTS

Representing City and County Governments of the San Francisco Bay Area



ABAG

Date: February 4, 2015

To: Regional Planning Committee

From: Gillian Adams, Senior Regional Planner
Pedro Galvão, Regional Planner

Subject: Housing Data Release 2015

Summary

From mid-2014 to early 2015, ABAG contacted the region's jurisdictions to track housing activities and policies. These efforts have resulted in four distinct work products that can be found in the attached documents and on our website <http://abag.ca.gov/planning/housing>:

1. A draft *2007-2014 Regional Housing Need Allocation (RHNA) Performance Report* which details the number of residential units for which building permits were issued by each jurisdiction in the Bay Area between 2007 and 2014 in fulfillment of their Regional Housing Need Allocation (Attachment 1).
2. A snapshot of residential development activity in 2013 detailing growth within and outside of Priority Development Areas (Attachment 2).
3. A regional housing policy database that tracks 30 housing policies and programs across jurisdictions (Attachment 3).
4. A regional inventory of housing sites identified in local jurisdictions' 2007-2014 Housing Elements.

Each data set is meant to be useful to diverse audiences including local planning staff as they update local plans and consider new housing policies to implement locally, for-profit and nonprofit housing developers as they seek to identify sites for future investments, and academic and nonprofit stakeholders seeking to study Bay Area housing trends.

Some highlights include:

- Between 2007 and 2014, the Bay Area permitted enough housing units to meet:
 - 49 percent of its overall housing need
 - 83 percent of its above-moderate-income housing need
 - 25 percent of its moderate-income need
 - 24 percent of its low-income need and
 - 27 percent of its very-low-income need.

- For the housing units permitted in 2013, 57 percent were located within PDAs and 29 percent outside of PDAs with the location of 14 percent of housing units – mostly single family homes – being unknown.
- The most commonly adopted local housing policies in order of frequency are mixed-use zoning, density bonus ordinances, reduced parking requirements, second unit ordinances, permit streamlining and inclusionary zoning.

These work products and the process of compiling them are described below.

1. Administrative Draft of 2007-2014 RHNA Performance Report

At the end of each RHNA cycle ABAG has typically compiled a summary report for the region regarding residential permitting activity during the cycle. With the 2007-2014 RHNA period ending on June 30, 2014, ABAG contacted all of the region's 109 jurisdictions for data regarding their residential building permits issued by income level between January 2007 and June 30, 2014.

The data was compiled exclusively from data sources generated and verified by the jurisdictions. For most jurisdictions, ABAG obtained permitting numbers from Annual Housing Element Progress Reports (APRs) filed by jurisdictions with the California Department of Housing and Community Development (HCD). In certain instances, where APR data was not available, ABAG made use of the following data sources:

- Locally adopted and HCD-certified Housing Elements for the 2007-2014 RHNA period
- Locally compiled draft housing elements for the 2014-2022 RHNA period
- Permitting information sent to ABAG directly by local planning staff

Once ABAG compiled initial figures, the Draft RHNA Performance report was vetted with jurisdiction staff.¹

Next Steps

ABAG will offer jurisdictions a final opportunity to offer revisions to the Administrative Draft of the 2007-2014 RHNA Report between February 4th and March 4th at which point the data will be finalized.

¹ ABAG staff contacted local jurisdictions by email and phone. We received no response from ten jurisdictions. The current data does not include information for four jurisdictions (noted with a zero and asterisk (0*) in the table). An additional six jurisdictions had incomplete data sets as noted in the attached spreadsheet.

1. Residential Development in PDAs and Outside of PDAs in 2013

ABAG surveyed the region's 75 jurisdictions with a locally-designated PDA in order to determine whether the units permitted in 2013 were located within or outside of a PDA.

This data was obtained primarily from APRs filed with HCD coupled with additional follow-up calls with relevant staff at each jurisdiction. ABAG was able to determine the location with respect to PDAs for 86 percent of the units permitted throughout the region.

The data collected by ABAG was provided to Congestion Management Agencies (CMAs) to help them compile their 2014 PDA Investment and Growth Strategy reports. Appendix B is the memo about the data that was sent to the CMAs.

Next Steps

ABAG will continue to compile location information for annual residential building permit activity from jurisdictions as well as improve location data to monitor ongoing PDA development levels.

2. Bay Area Housing Policy Database

In order to better understand what housing policies currently exist throughout the Bay Area, ABAG contacted all of the region's jurisdictions to compile a regional housing policy database (Attachment 3). This database tracks thirty housing policies in six broad categories: market-rate housing production strategies, affordable housing production strategies, anti-displacement strategies, locally-funded affordable housing strategies, other locally-funded housing strategies, and by-right development strategies.

ABAG compiled an initial list of the most commonly implemented housing policies (in Attachment 3) through an assessment of each jurisdiction's 2007-2014 HCD-certified housing element. ABAG then generated a list with a "yes" or "no" to indicate whether a given jurisdiction had a certain policy in place. This initial list was shared with jurisdiction staff who was asked to verify the information. Revisions were then made according to locally-provided data.²

Next Steps

² ABAG received relatively fewer responses to our request for local verification for this request than for our other data sets and, as a result, ABAG will continue to refine and verify this data.

In 2015, ABAG will work to develop the current database into one that provides greater detail about each local housing policy based on a set of key criteria currently being developed internally in consultation with academics and subject-matter experts.

3. Regional Housing Opportunity Sites Inventory

Housing Element Law (Government Code Section 65583(a)(3)) requires jurisdictions to compile an inventory of land suitable for residential development to meet their jurisdiction's RHNA allocation for the planning period. For the first time, ABAG has compiled a regional inventory of sites suitable for housing development from local jurisdictions' adopted and certified 2007-2014 Housing Elements. This information has been made publicly available on ABAG's website and can be downloaded as GIS files.

Next Steps

In 2015 ABAG will be updating its regional housing opportunity sites inventory with information from each jurisdiction's adopted and certified 2014-2022 Housing Element

Recommended Action

None. This is an informational item.

Attachments

- Attachment 1: Administrative Draft of the 2007-2014 RHNA Performance Report
- Attachment 2: Memo—Summary of ABAG Data Gathering Efforts for PDA Investment and Growth Strategies, September 5th, 2014
- Attachment 3: Regional Housing Policies Summary