



## Index of Regional Housing Technical Assistance Products

*This document outlines all the resources developed by the Regional Housing Technical Assistance (RHTA) Program. Newly added items are highlighted in yellow.*

### Housing Elements Adoption Templates and Timing Requirements

These templates can be used by jurisdictions to present their final Housing Elements to their governing bodies for adoption.

These include:

- [RHNA 6 Housing Element Statutory Provisions Checklist \(updated July 2023\)](#)  
This update includes statutory provisions as of January 1, 2023. Any amendments effective on that date apply to a housing element draft submitted to HCD after April 1, 2023 and to any housing element which has not yet been adopted, where the first draft was not submitted to HCD before January 31, 2023.
- [Staff Report Template for Adopting the Housing Element](#)
- [Planning Commission Resolution Template](#)
- [City Council or Board of Supervisors Resolution Template](#)
- [Response to HCD Findings Template](#)

[Timing Requirements for Adoption of the Housing Element and Required Rezoning](#) (updated 04.01.2023) summarizes timing requirements for the adoption of housing elements and required rezoning. It also notes some of the potential risks that may result from missing these deadlines, including limitations on denials of housing projects and loss of eligibility for certain funding programs. This version, revised in April 2023, clarifies HCD's interpretation of when a jurisdiction is considered in compliance.

[Requirements for Adoption of the Housing Element and Consequences of Late Adoption](#) (July 2022) provides an overview of requirements for the 6th Cycle Housing Element and the consequences of late adoption.

### Housing Elements & HCD Comments

This [page](#) includes all the RHTA resources on draft Housing Elements and HCD comments.

- Staff are tracking the submission of Bay Area draft Housing Elements and the comments jurisdictions receive from HCD. Copies of the drafts and HCD comment letters are available [via this link](#).
- ABAG staff and consultants have reviewed Housing Element comment letters for Bay Area jurisdictions as HCD has released them. A total of six jurisdictions have received comment letters as of September 15, 2022. [This document](#) summarizes key findings from the comments.

- [Learning from Southern California and Sacramento](#): Analysis of HCD comment letters and lessons for Bay Area jurisdictions as they prepare their 6th cycle Housing Elements.
- [Responding to HCD Comments for Certification](#): These case studies summarize how four cities in Southern California and the Sacramento region responded to challenging HCD comments related to sites inventory, AFFH and other Housing Element topics. The documents present important strategies that cities in the ABAG region can use to prepare their Housing Elements for certification.
- The RHTA Program has created [CommentBot](#) (link is external) (C-Bot), a tool to help Bay Area jurisdictions address HCD's comments in their next draft housing element. C-Bot provides suggestions and links to RHTA and HCD resources to help jurisdictions address common concerns that HCD has raised in past comment letters. C-Bot can be found here: <https://c-bot.info/>
- [Housing Element Compliance and Key Funding Programs Summary](#) This overview memo and table summarize housing element requirements and key deadlines for several funding programs.
- [How to Engage Farmworkers in the Housing Element Process](#): This guide is intended to provide practical advice to cities, towns and counties for conducting outreach and engagement — even if there are not farms or farmworkers living within your community. The accompanying templates can be downloaded and edited to fit your jurisdiction's needs.

## Affirmatively Furthering Fair Housing

Recently, the [Affirmatively Furthering Fair Housing Policies and Programs Toolkit was released](#) to assist local jurisdictions with completing the crucial step of establishing AFFH goals, policies and actions in the Housing Element. The toolkit highlights 15 key strategies Bay Area jurisdictions can implement to further fair housing. The AFFH Policies and Programs Toolkit was reviewed by HCD staff and incorporates their feedback. HCD has emphasized in recent comments on Bay Area jurisdictions' draft Housing Elements that AFFH should be central to the Housing Element's overarching goals and inform all objectives and policies.

- An Affirmatively Furthering Fair Housing Policy Resources [Annotated Bibliography also summarizes](#) existing housing policy resources which help identify goals, policies and actions to address a range of fair housing issues.

Staff hosted two webinars and launched the first set of AFFH resource products during the summer of 2021. The first webinar, *AFFH: The Nuts and Bolts with HCD*, was held on June 22 and covered the basics of AB 686 and outlined new requirements for the Housing Element. The second webinar, *AFFH: Data Deep Dive*, was held on July 13 and served as a more focused look into the analysis required for the Assessment of Fair Housing (AFH), and specifically the segregation and integration patterns analysis, which featured ABAG's work with UC Merced via the [STIR Labs partnership](#). Both webinar recordings and presentation materials can be found on ABAG's Regional Housing Technical Assistance Training [website](#).

As a follow up to the July webinar, the AFFH template [staff report](#) and [slide deck](#) were released for jurisdiction staff to use in introducing the new requirements to their local decisionmakers. Additionally, staff disseminated a [AFFH Data Guidance Checklist](#) which provides sources to data points outlined in the AFH. The final version of this checklist is in development and pending release this fall.

Additional AFFH TA includes:

- AFFH layer added to HESS tool
- [Segregation and Land Use Reports](#): Each jurisdiction's report and accompanying dataset provide segregation measures for both the local jurisdiction and the region using several indices, as required by

the AFFH guidance issued by the California Department of Housing and Community Development (HCD). Local jurisdiction staff can use the segregation report and dataset to complete a component of the Assessment of Fair Housing, which requires analysis of segregation patterns related to race, other protected characteristics, and lower-income households.

- [AFFH Tips Memo](#): This document provides a summary review of HCD comments on Housing Elements submitted from other jurisdictions throughout the state to identify common pitfalls and make recommendations about how Bay Area jurisdictions can craft policies to meet AFFH goals -streamlining the path towards certification.
- Leading with Equity Working Group. Launched in March 2022 with 15 planning and housing department staff who sought to advance racial and housing equity policies and programs within their Housing Element work. The work group focused on promoting leadership development, capacity building toward understanding and navigating institutional change, peer-support and one-on-one coaching.

## Webinars

Since the RHTA program began, 30 webinars have provided information on a variety of topics. All webinar materials are available on this [webpage](#)

- [2024 Changes to the APR with HCD](#)
- [2023 New State Housing Laws Overview](#)
- Overview of AB 2011 and SB 6
- Annual Progress Reports with HCD
- Talking with the Media about Housing
- 2022 New Housing Laws
- Bay Area Priority Sites Pilot Program
- How to Address HCD Comments for Certification
- Terner Center and ABAG Present: Best Practices to Implement SB 9 and Missing Middle Housing in the Bay Area
- Leveraging Your Land: Best Practices for Reusing Public Land for Housing
- Transforming Aging Malls and Office Parks: Reuse Challenges and Opportunities
- Housing Planning: For the Future
- Planning Innovations Webinar: Regional Data Tools for the Housing Element
- Housing Element 101 - Overview and New Laws + Tips
- Creating Capacity: An Overview of the Sites Inventory
- Using Data Effectively in Housing Element Updates – ABAG’s Housing Needs Data Packets and Accessing the US Census
- How to Talk About Housing – Data-Driven Lessons on Housing Communications that Work and Those that Backfire
- Incorporating Environmental Justice and Safety into your Housing Element
- Housing Sites Inventory - Deep Dive
- Engage How To! Introduction to Remote Meeting Tools
- Affirmatively Furthering Fair Housing: The Nuts and Bolts with HCD
- Affirmatively Furthering Fair Housing: Data Deep Dive
- Integrating Climate Adaptation/Resilience into Your Housing Element
- Context of SB 9 and Potential Impacts
- HESS Tool 1.0 Tutorial Webinar

- Surplus Public Land: webinar and presentation
- New Housing Law: webinar and presentation
- Keep Calm and Certify On: Tips from Early Adopters
- New Annual Progress Report Requirements with HCD
- Webinar for Elected Officials: Learn About Available Assistance for Housing Element Updates

## Communications, Messaging & Community Engagement

Recent products include:

- [RHTA Photo Catalog \(updated June 2023\)](#)  
This catalog provides photos illustrating neighborhoods with varied types of housing. All photos are available for use by Bay Area jurisdictions working on housing public engagement.
- ["Let's Talk About Housing:" Communications Guide for Local Government](#)  
This document is a data-driven communications guide for use by staff and elected officials to foster productive conversations with residents about housing. The guide is based on existing and new research and includes consistent, clear language for discussions about affirmatively furthering fair housing (AFFH) legislation.
- [Best Practices for Equitable Engagement Primer](#)  
This document shares effective ways to engage communities and stakeholder organizations that traditionally are underrepresented in local government processes. It is designed to provide local jurisdictions with a range of tools, strategies and best practices for engaging all community members.
- Consultant support (communications coaching, meeting facilitation services, meeting materials).
- [508 compliance guidelines](#)
- [Missing Middle photo gallery with density information](#)
- [CBO and media contact lists](#)

Previously released information:

- Housing Element Webinar: [How to Talk About Housing](#) – Data-Driven Lessons on Housing Communications that Work and Those that Backfire (4/27/2021)
- Housing Element Webinar: [Engage How To! Introduction to Remote Meeting Tools](#) (5/25/2021)
- Balancing Act online public engagement housing simulation tool available for 25 jurisdictions and reduced rate negotiated for additional jurisdictions
- [Access to template survey](#) for jurisdictions to send to community members to gather information about housing issues and concerns
- Access to tool kit, including messaging guide to provide assistance in discussing housing and AFFH with community members. Several items of the tool kit have already been produced and are available on the website, including [Consequences of Non-Compliance with Housing Element Update](#).
- [Housing TA portal](#), allowing ease of access to range of relevant materials
- [Guide to Housing Element + AFFH Public Participation](#)
- Assistance with translation and interpretation ([link](#)).
- [Best practices for engaging multilingual constituents](#)

## Upcoming

- AFFH outreach after comment letters
- REAP 2.0 outreach

## Housing Data Tools

[Housing Needs Data Packets](#) for all 109 Bay Area jurisdictions contain tables, figures, and accompanying text for over 60 data points that can be placed directly into the Housing Needs section of each jurisdiction’s housing element. The data packets were [pre-reviewed by HCD for consistency with state requirements](#) to create predictability during the Housing Element review process.

[Housing Element Site Selection “HESS” Tool](#), launched in Fall 2020, is a web-based mapping platform that assists Bay Area jurisdictions with site identification for Housing Element site inventories and flags sites that will likely require rezoning to be used under new state laws. In Fall 2021, ABAG launched a [1.0 update](#) to the HESS Tool based on feedback received from local planning staff, consultants, subject-matter experts and HCD. Updates included more granular screening categories, additional filters, an editing module to update underlying local land use data, and more.

**HESS Tool 2.0 Modules** were released in April 2022. The first module is an **AFFH Map** which allows local planners to visualize the distribution of their site inventories alongside key AFFH data layers. The second module supports jurisdictions with the **Realistic Capacity Calculations** for sites included in their inventories. ABAG has collected and analyzed data from local jurisdictions’ Annual Progress Reports, Zoning Ordinances, and General Plans to adjust the theoretical maximum capacity of sites to reflect historical building trends more accurately. Users can generate realistic capacity reports prepopulated with this data, which can be submitted to HCD as supportive documentation. AFFH attributes have also been added to the site inventory form and local staff can produce their own pivot tables.

[Housing and Land Use Viewer “HLUV” Tool](#), launched in May 2023, is a publicly accessible website that builds on the HESS tool. The website includes regional, county, and jurisdictional views of housing element sites (from the 4<sup>th</sup>, 5<sup>th</sup>, and 6<sup>th</sup> cycles), environmental constraints (including wildfire and sea level rise risks), and planning considerations (including Transit Oriented Communities, Equity Priority Communities, Plan Bay Area 2050 Growth Geographies, zoning, infrastructure access, and data identified in HCD’s AFFH Guidance Memo). ABAG will continue to update the website with housing inventories in newly certified housing elements, major updates to the parcel basemap, and zoning and general plan data for the region.

HESS and HLUV Office Hours are available on an ongoing basis – staff can request office hours and make other data requests by emailing Heather Peters at [hpeters@bayareametro.gov](mailto:hpeters@bayareametro.gov).

### Webinar Recordings

- 10/29/2020: [Planning Innovations Webinar: Regional Data Tools for the Housing Element: Webinar video recording](#) and [Webinar presentation](#)
- 3/9/2021: ABAG Housing Element Series: [Creating Capacity: An Overview of the Sites Inventory: Webinar video recording](#) and [Webinar presentation](#)
- 3/23/2021: ABAG Housing Element Series: [Using Data Effectively in Housing Element Updates: Webinar video recording](#) and [Webinar presentation](#). Introduces the ABAG housing needs data packets and provides information on accessing the U.S. Census.
- [HESS Tool 1.0 Tutorial Webinar](#)

## Peer Cohorts and Work Groups

- Missing Middle Workgroup
  - a. Products
    1. Slide templates and talking points for use by staff
    2. Market report and interactive feasibility analysis tool
    3. Zoning guidebook
    4. Affordability strategies guidebook
    5. RHNA guidance memo
    6. [Middle Market Housing Development Tool](#)
  - b. Links
    - [Session 1: What is the Missing Middle?](#)
    - [Session 2: The Middle Housing Market](#)
    - [Session 3: Making Middle Housing Happen](#)
    - [Session 4: Making Middle Housing Affordable](#)
    - [Session 5: Projecting Middle Housing Production](#)
- Wildfire: all four sessions including webinar recordings, presentations, and resource guides are on [this website](#).
- “Big 3” Cohort (Oakland, San Francisco and San Jose)
- Leading with Equity Work Group
- [Malls & Office Parks Transformation Work Group](#).  
Session materials, as well as the [Mall and Office Transformation Guide](#), provide a suite of resources to help communities and planners build homes, parks, and other community amenities in place of empty malls and offices.
- [Zoning For Affordability Work Group](#)  
The Zoning for Affordability Work Group started in early April and will run through August 2023. These six, 90-minute sessions are aimed at jurisdictions looking to:
  - Adopt an inclusionary zoning ordinance, density bonus policy or affordable housing overlay zone or similar program; or
  - Update their existence ordinance or program to make it more effective.Discussion topics will include evaluating an inclusionary ordinance, evaluating financial feasibility, working with state programs and understanding the tradeoffs of fees versus units. The sessions will include peer learning opportunities and resources for hands-on learning.

Materials from completed sessions can be found here:

- [Session 1a: Introduction](#)
- [Session 1b: Evaluating an Inclusionary Housing Policy](#)
- [Session 2: Evaluating Economic Feasibility](#)
- [Session 3: Compliance Alternatives](#)
- [Session 4: Working with State Policies](#)
- [Session 5: Communicating with the Public and Elected Officials](#)



## Ongoing and Upcoming

- Farmworker Housing Work Group
- Regional Objective Design and Development Standards Work Group

## Other Regional Products

- [Zoning for Affordability – Inclusionary and Density Bonus Materials.](#)
  - **Recently Updated Inclusionary Zoning Ordinances.** This document provides a summary and links to recently updated to inclusionary zoning regulations across multiple jurisdictions in the Bay Area.
  - **Feasibility Study Requirements.** This document explains what an inclusionary zoning feasibility study is, why it might be helpful and when it is required.
- [AB 2339 Housing Element Analysis Memo.](#)
  - AB 2339 requires additional analysis related to emergency housing for Bay Area jurisdictions that 1) submit drafts of Housing Elements to HCD after April 1, 2023, or 2) did not submit a first draft to HCD until after January 31, 2023. This memo provides a framework for how to conduct that analysis. HCD will not certify a Housing Element subject to AB 2339 unless a satisfactory analysis is included.
- [Programs to Rezone: Technical Memo.](#)
  - This technical memo describes how to use a program to rezone if you have a shortfall of sites in your inventory in your Housing Element. This memo was updated in July 2023 to incorporate the Clovis Court of Appeal decision (Martinez v. City of Clovis (2023) 90 Cal.App.5th 193.).
- [2023 Potential New Housing Legislation: Overview and Presentation.](#)
  - This is a summary of some of the housing legislation that could have a significant impact on local jurisdictions if it is enacted into law. These documents, including a slide deck, are intended solely as a technical overview of new housing-related legislation.
- [The Builders' Remedy and Housing Element Paper \(updated July 2023\)](#)
  - This paper describes the provisions of the Housing Accountability Act that constitute the "Builder's Remedy" and how they may apply to a proposed housing development project.
- [AB 2011 and SB 6 Staff Resources for Implementation](#)
  - AB 2011, the Affordable Housing and High Road Jobs Act of 2022 and SB 6, the Middle Class Housing Act of 2022, are intended to permit residential development on sites currently zoned and designated for commercial or retail uses. Both bills will go into effect on July 1, 2023. These guides and templates are meant to prepare staff for implementing these bills and prepare for accepting and reviewing AB 2011 project applications.
- [AB 725 General Plans Housing Element: Moderate-Income Housing](#)
  - Assembly Bill 725 General Plans: Housing Element: Moderate-Income Housing: Suburban and Metropolitan Jurisdictions (2019-2020), passed in 2021, adds new rules regarding the sites that can be used in Housing Elements. Generally, the legislation requires that jurisdictions' Housing Elements plan a portion of their regional housing needs for moderate-income and above-moderate-income units on medium-density sites. This document explains the requirements and how cities can comply with the new rules.

- [Inclusionary Affordable Housing Program Considerations](#)
  - This guidance paper is intended to present policy considerations for creating or updating an inclusionary housing program, to implement certain state program requirements as of 2022, and to identify major items that are typically addressed in developer agreements, rent regulatory agreements, and affordable homebuyer agreements.
- [Guide to California State Replacement Housing Requirements](#)
  - This technical overview describes replacement housing requirements under three state laws - the Density Bonus Law, Housing Element law, and the Housing Crisis Act of 2019. The purpose of the replacement requirements is to prevent the loss of housing units and the displacement of lower income households.
- [Understanding AB 2011 and SB 6](#)
  - This technical overview includes policy decisions and recommended actions, site criteria and development standards, and general project requirements and review timelines for both AB 2011 and SB 6.
- [Overview of AB 2011 and SB 6 \(updated 5.18.2023\)](#)
  - AB 2011, the Affordable Housing and High Road Jobs Act of 2022 and SB 6, the Middle Class Housing Act of 2022, are intended to permit residential development on sites currently zoned and designated for commercial or retail uses. Both bills were signed into law by Governor Gavin Newsom on September 29, 2022, and will go into effect on July 1, 2023. This document presents a summary of key details of each bill.
- [Farmworker Housing Toolkit](#)
  - This Farmworker Housing Toolkit provides a one-stop source of information to assist local agencies in including the special housing needs of Farmworkers within their Housing Elements with the legislative framework, data, policies and programs that local jurisdictions can reference in the development of their farmworker housing needs analysis for their Cycle 6 Housing Element.
- [SB 9 materials:](#)
  - Webinar, slide deck, memo templates, Summaries, FAQ and Other References
  - Model ordinance
  - Objective Design and Development Standards (ODDS) Toolkit
  - SB 9 application checklist for two-unit developments and urban lot splits
  - Sample deed restrictions for two-unit development and lot splits
  - Sample Affidavit regarding owner-occupancy
- [ADU Affordability Safe Harbor](#) – counting towards RHNA
- [Consequences of Non-Compliance with Housing Element Update](#)
- Pilot of Symbium Plancheck software to streamline permitting ([see announcement](#))
- Parking TA:
  - [Parking toolbox and handbook](#)
  - [Parking presentation and webinars](#)
  - Future parking assistance [sign up form](#)

## Upcoming

- Round two legal products under way (coming soon)
  - Regulator agreements checklist
  - New laws cheat sheet



## Templates

- [SB 330, Housing Crisis Act of 2019, Request for Tenant Information Form and Tenant Statement Template](#)
- [SB 330, Housing Crisis Act of 2019, Replacement Housing Tenant Letter Template](#)
- [Housing Element Timeline Template \(updated 4.01.2023\)](#). The timeline was updated in April 2023 with a footnote summarizing that HCD considers a jurisdiction to be in compliance with Housing Element law after HCD issues a formal letter.
- [Jurisdiction Housing Element RFP Template](#) a request for Proposals (RFP) template for local jurisdictions to hire consultants to assist with Housing Element updates
- [Housing Element Staff Report Template](#)
- [What is a Housing Element? Briefer Template](#)
  - [What is a Housing Element? Briefer Template \(Word version\)](#)
  - [What is a Housing Element? Briefer Template \(Spanish translation version\)](#)
  - [What is a Housing Element? Briefer Template \(Chinese translation version\)](#)
- [Housing Element FAQs Template](#)
- [AFFH Template Staff Report](#)
- [AFFH Template Staff Slide Deck](#)
- [AFFH Data Guidance Checklist](#)

## Resilience TA

- [Briefer on Integrated Planning - EJ and Safety Element Updates](#)
- [Sample Agenda for Integrating Planning](#)
- [Safety Element New Requirements](#)
- [Status of Resilience and EJ Planning in the Bay Area](#)
- ABAG webinar co-hosted by California Office of Planning & Research: [Incorporating Environmental Justice and Safety into your Housing Element: Webinar video recording](#) and [Webinar presentation](#)

## Regional Planning Consulting Bench

ABAG has established a Regional Planning Bench with 92 consultants in 11 service categories. The Bench is available to all jurisdictions in the Bay Area to use in accordance with their local procurement rules.

ABAG launched a labor-saving online tool from City Innovate that allows jurisdictions to easily search bench consultant profiles and compare consultants' qualifications and rates. The tool also facilitates informal solicitations of quotes for work when applicable procurement rules allow.

### Related Links

- [Frequently Asked Questions](#) regarding the Grants and Regional Planning Consulting Bench
- [Request for Qualifications](#) used to seat the Regional Planning Consulting Bench

## Local Grants

Funding amounts can be found in this [Grant Amounts spreadsheet](#). Draft funding agreements were sent to all Bay Area jurisdictions in July offering each the option of receiving reimbursements for eligible expenses, or the option of electing to have ABAG hold the funds and administer consulting contracts on behalf of the recipient jurisdiction. [REAP Non-competitive Allocation: Eligible Activities](#)

## County Planning Collaboratives

County-based groups staffed by a paid coordinator who provides technical assistance and facilitates cross-jurisdiction engagement for the Housing Element updates and other housing-related topics.

Collaborative Contacts:

1. Alameda: Carla Violet, UPP, [cviolet@up-partners.com](mailto:cviolet@up-partners.com)
2. Contra Costa: Shawna Brekke-Read, MIG, [sbrekkeread@migcom.com](mailto:sbrekkeread@migcom.com)
3. Marin: Jillian Zeiger, Marin County, [jillian.zeiger@marincounty.gov](mailto:jillian.zeiger@marincounty.gov)
4. Napa/Sonoma: Jane Riley, 4Leaf, [jriley@4leafinc.com](mailto:jriley@4leafinc.com)
5. Santa Clara: Samantha Dolgoff, Community Planning Collaborative, [dolgoff@planningcollaborative.com](mailto:dolgoff@planningcollaborative.com)
6. San Mateo: Josh Abrams, Community Planning Collaborative, [abrams@planningcollaborative.com](mailto:abrams@planningcollaborative.com)
7. Solano: Robert Guerrero, STA, [rguerrero@sta.ca.gov](mailto:rguerrero@sta.ca.gov) and Jennifer Gastelum, Placeworks, [jgastelum@placeworks.com](mailto:jgastelum@placeworks.com)

Recording of Planning Collaboratives Kick-Off April 13, 2021. This webinar introduces the County Planning Collaboratives.

- [Planning Collaboratives Kick-Off: Webinar video recording](#)
- [Planning Collaboratives Kick-Off: Presentation](#)
- Additional resource from the webinar: [A Collaborative Approach to Addressing our Housing Challenges](#)

## HCD TA

- [Housing Planning Hub Site](#) is a repository of statewide and regional toolkits, factsheets, and guidance on a variety of housing policy areas with a specific focus on priority policy areas. HCD will continually update the resource center as new tools become available.
- [Prohousing Designation](#) free technical assistance to gain designation and bonus points for state funding programs.
- [Housing Element Educational Video](#) for the 6th cycle housing element update targeting local elected officials, stakeholders, and the public. This video is available for free in English and Spanish with closed captioning. Local governments can embed links to the video on their websites.