

# SB 2 Planning Grants Webinar

April 17, 2019

# How to Ask a Question

- All phone lines have been muted.
- For written questions - use the Q&A window to the right side of your screen. Please enter your name, title and city.

# Welcome and Opening Remarks

- Carolyn Coleman, Executive Director, League of California Cities
- Stephanie Park, Policy Consultant, Senate President Pro Tempore Toni G. Atkins
- Ben Metcalf, Director, California Department of Housing and Community Development (HCD)

# Presentation Outline

## **I. SB 2 Planning Grant Program NOFA: Application Overview**

- a. John Buettner, HCD Specialist

## **II. Technical Assistance Overview**

- a. Sohab Mehmood, HCD Representative II
- b. Chelsey Payne, Deputy Project Manager, PLACEWORKS
- c. Natalie Kuffel, Land Use Counsel, Governor's Office of Planning and Research
- d. Helen Campbell, Senior Projects Analyst, Governor's Office of Planning and Research

## **III. The Institute for Local Government**

- a. Karalee Browne, Program Manager, Institute of Local Government (ILG)

# Senate Bill (SB) 2 Planning Grants Program (PGP) NOFA



# SB 2 created the

- First permanent source of funding dedicated to affordable housing development

<b><i>Year 1</i></b>	<b>50% Planning Grants 5% for Technical Assistance</b>	<b>50% Homeless Programs</b>
<b><i>Year 2 and beyond</i></b>	<b>70% Affordable Housing</b>	<b>15% middle-income rental 5% production incentive 10% farmworker housing</b>

# Program Goals

**Accelerate  
housing  
production**

**Streamline  
approval of  
housing**

**Facilitate  
housing  
affordability**

**Promote  
development**

**Ensure  
geographic  
equity**

**Support local  
govts.  
through TA**



# Program Highlights

**Over-the-counter  
process**

**Non-  
competitive**

**8-month  
application  
window**

**Grant amounts  
based on  
population  
categories**

**Priority Policy  
areas**

**Technical  
assistance**





# Funding Available

<u>Minimum Grant</u> Any size	<u>Small</u> Up to 60,000 people	<u>Medium</u> 60,000 – 200,000 people	<u>Large</u> Greater than 200,000 people
<b>\$25,000</b>	<b>Max \$160,000</b>	<b>Max \$310,000</b>	<b>Max \$625,000</b>



# Important dates

Events	Dates
NOFA release	March 28, 2019
NOFA Application Workshops/Webinar	April 1 – May 1, 2019
Final due date for OTC applications	November 30, 2019
Housing Element adoption Housing Element compliance	By date of submission of the application By the time of award
Annual progress report submissions	By date of submission of the application
Anticipated end of grant term (expenditure dates)	June 30, 2022
Technical Assistance Program	March 28, 2019 – June 30, 2022

# Eligibility Considerations and Priority Policy Areas





# Eligible Applicants

- Local governments i.e., cities and counties
  - Local governments may partnership via legally binding agreements w/other local entities such as regional governments, housing authorities, school districts, special districts, community based organizations, or any duly constituted governing body of an Indian Reservation or Rancheria.



# Threshold Requirements

- 1) Housing Element (HE) compliance
  - Refer to HCD website for compliance status
  
- 2) Annual Progress Report (APR) Submittal
  - 2017 or 2018
  
- 3) Demonstrate a nexus to accelerating housing production
  - Exception: Applicants utilizing Priority Policy Areas (PPA) automatically prove the nexus
  
- 4) Certify consistency with State or Other Planning Priorities
  - Self-certification



# Policy Priority Areas (PPA)

- Rezone to permit by-right
- Objective design and development standards
- Specific plans or Form based codes coupled with CEQA streamlining



# PPAs

- Accessory Dwelling Units (ADU) or other low-cost building strategies
- Expedited processing (speeding up approvals and permit processing)
- Housing Related Infrastructure Financing and Fee Reduction Strategies



# Applications and PPAs

- Applicants proposing PPAs are automatically deemed to accelerate housing production without any further documentation or demonstration to the Department (**unless mixing with activities that are not considered PPAs**).
  - Streamlines the approval process
  - Applicants not utilizing PPAs must demonstrate their activity's nexus to accelerating housing production





# Eligible activities include, but are not limited to

- Updates to general plans, community plans, specific plans, local planning related to implementation of sustainable communities strategies, or local coastal plans
- Updates to zoning ordinances
- Environmental analyses that eliminate the need for project-specific review



# Eligible activities include, but are not limited to

- Local process improvements that improve and expedite local planning
- Pre-approved site plans
- Regional housing trust fund plans
- Other activities that demonstrate a nexus to accelerating housing production



# Eligible Uses

- Costs of preparing and adopting the proposed activity
- May not be used for administrative costs of persons employed by the grantee for activities not directly related to the proposed activity
- Maximum of five percent may be used for administrative costs

# Application and Forms





# Application and Forms

The Guidelines, NOFA, Application, Taxpayer ID, and Grant Amounts can be downloaded from the SB 2 Planning Grants webpage:

## Guidelines

- [Guidelines \(PDF\)](#)

## Get Funding

- [2019 Notice of Funding Availability – SB 2 Planning Grants Program \(PDF\)](#)
- [SB 2 Planning Grants Program Application \(PDF\)](#)
- [Government Agency Taxpayer ID Form !\[\]\(9a53fe79a03d38d8322f7a2c5a875b36\_img.jpg\) \(PDF\)](#)
- [Maximum Grant Amounts Per Jurisdiction \(PDF\)](#)



# Application Information

## Packaging Instructions

## Section A. Applicant Information

## Section B. Applicant Certification

## Section C. Threshold Requirements

## Section D. Proposed Activities Checklist

## Section E. Project Description

## Section F. Project Timeline and Budget

## Section G. Legislative Information



# Application Attachments

Attachment 1: Planning Priorities Certification

Attachment 2: Nexus to Accelerating Housing Production

Attachment 3: Sample Resolution

Appendix A and B (for additional information)



# Packaging

The package must contain the following:

1. Original signed application and
  - a. Attachment 1 (all applicants must provide)
  - b. Attachment 2 (only if not utilizing PPAs)
2. Fully executed resolution
3. Government Agency Taxpayer ID Form
4. Copy of legally binding partnership agreement  
(if applicable)
5. **Other documentation as necessary to prove nexus  
(letters of support, plans, studies, etc.)**





# Section A: Applicant Information

## A. Applicant Information

*Pursuant to Article II, Section 200 of the Guidelines, local governments may partner through legally binding agreements with other forms of governments or entities. However, all local governments must submit separate, signed application packages that identify their respective responsibilities and deliverables, even if partnering with other entities.*

<b><i>Is the applicant partnering with another eligible local government entity?</i></b>		
<input type="checkbox"/>	<b><i>*Yes</i></b>	<b><i>*If Yes, the application package must include a fully executed copy of the legally binding agreement. Provide the partners' name(s) and type(s) below for reference only.</i></b>
<input type="checkbox"/>	<b><i>No</i></b>	



# Partnering With Other Entities

Partnerships are allowed via legally binding agreements. Please include a copy of the agreement and the names of all partners in Section A, if applicable.

<b>Partner(s) Name <i>(if applicable)</i></b>	
<b>Partner Agency Type</b>	
<b>Partner(s) Name <i>(if applicable)</i></b>	
<b>Partner Agency Type</b>	



# Section C: Threshold Requirements

Question 3, utilizing PPAs: be sure to provide Attachment 2 if not utilizing PPAs.

**3. Is the applicant utilizing one of the *Priority Policy Areas* listed below (as defined in section VIII, subsection (3) of the NOFA)?**

<input type="checkbox"/>	*Yes	<p><i>*If the applicant is proposing <b>only</b> Priority Policy Areas, <u>do not fill out Attachment 2</u>. However, if the applicant is proposing to fund PPAs AND other activities that are not considered PPAs, the application must demonstrate how these other activities have a nexus to accelerating housing production by filling out Attachment 2 of this application.</i></p>				
	Rezone to permit by-right	Objective design and development standards	Specific Plans or form based codes coupled with CEQA streamlining	Accessory Dwelling Units or other low-cost building strategies	Expedited processing	Housing related infrastructure financing and fee reduction strategies
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	No	<p><i>If an applicant is not proposing Priority Policy Areas, the application must include an explanation and document the plans or processes' nexus and impact on accelerating housing production based on a reasonable and verifiable methodology and must submit Attachment 2 in the Application pursuant to section VIII, subsection (3) of the NOFA.</i></p>				
<input type="checkbox"/>	<p>The applicant is proposing PPAs and other activities not considered PPAs and is demonstrating how these activities have a nexus to accelerating housing production by submitting <i>Attachment 2</i>.</p>					



# Section F: Project Timeline and Budget

Denote responsible party

Is the deliverable a PPA?

F. Project Timeline and Budget

Project Goal(s)							
Objective	Responsible Party	Est. Cost	Begin	End	Deliverable	*PPA	Notes
Complete	Applicant					Yes	
	Partner					No	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	
	<b>Total Est. Cost \$</b>	0					

\*PPA: Public Access (PPA)





# Section F: Example

## F. Project Timeline and Budget

Project Goal(s)							
Objective	Responsible Party	Est. Cost	Begin	End	Deliverable	*PPA	Notes
Objective Multi Family Design Guidelines	Applicant	\$ 0	5/15/19	12/13/19	Objective Multi Family Design Guidelines	Yes	\$147,432 Total Cost
Public Workshops	Applicant	\$ 32,435				N/A	
Admin Draft Guidelines	Applicant	\$ 100,253				N/A	
CEQA	Applicant	\$7,372				N/A	Assumed Exempt
Adoption Hearings	Applicant	\$ 7,372				N/A	2 PC/2 CC
	Other					N/A	
ADU Ordinance Update	Applicant	\$ 0	6/3/19	9/27/19	Revised ADU Ordinance	Yes	\$12,568 Total Cost
Draft Ordinance	Other	\$ 9,425				N/A	
CEQA	Other	\$ 629				N/A	Assumed Exempt
Adoption Hearings	Other	\$ 2,514.00				N/A	1 PC 1 CC
	Other					N/A	
	Other					N/A	
	Other					N/A	
	Other					N/A	Total \$160,000
	<b>Total Est. Cost \$</b>	160000					

\*Priority Policy Area (PPA)



# Attachment 1: Planning Priorities Certification

All applicants must self-certify their jurisdiction's status for meeting **State Planning Priorities** or **Other Planning Priorities**.

## State Planning Priorities

Date Completed	Brief Description of the Action Taken
<b>Promote Infill and Equity</b>	
<div data-bbox="44 862 373 1081" style="background-color: #f4a460; border-radius: 15px; padding: 5px; display: inline-block;">Choose date action was taken</div>	<div data-bbox="856 846 1713 992" style="background-color: #f4a460; border-radius: 15px; padding: 5px; display: inline-block;">Summarize the action taken</div>
	<i>maintaining, and improving development and presenty served by and redevelopment of pre-ter, sewer, and other essential services particularly in underserved areas.</i>

## Other Planning Priorities

<b>Affordability and Housing Choices</b>	
<i>Incentives and other mechanisms beyond State Density Bonus Law to encourage housing with affordability terms.</i>	



# Attachment 2: Nexus to Accelerating Housing Production

***Fill out Attachment 2 only if the applicant answered “No” to item 3 in Section C or is utilizing Policy Priority Areas AND other activities not designated as such. Applicants answering “Yes” to question 3 in Section C and utilizing ONLY Priority Policy Areas are automatically deemed to demonstrate a nexus to accelerating housing production, and do not need to complete this form.***

- If using both PPA(s) and regular activities, you must submit Attachment 2 and \*document the nexus.

\*Documentation such as letters of support, plans, studies, etc., may be required to support your case.





# Attachment 3: Sample Resolution

## Attachment 3: Sample Resolution

RESOLUTION NO. 2019-XX  
A RESOLUTION OF THE [CITY COUNCIL/COUNTY BOARD OF SUPERVISORS] OF  
\_\_\_[CITY, COUNTY NAME]\_\_\_  
AUTHORIZING APPLICATION FOR, AND RECEIPT OF,  
SB 2 PLANNING GRANTS PROGRAM FUNDS

WHEREAS, the State of California, Department of Housing and Community Development (Department) has issued a Notice of Funding Availability (NOFA) dated March 29, 2019, for its Planning Grants Program (PGP); and

WHEREAS, the [City Council/County Board of Supervisors] of \_\_\_\_\_ (City/County) desires to submit a project application for the PGP program to accelerate the production of housing and will submit a 2019 PGP grant application as described in the Planning Grants Program NOFA and SB 2 Planning Grants Program Guidelines released by the Department for the PGP Program; and

WHEREAS, the Department is authorized to provide up to \$1.2 million under the SB 2 Planning Grants Program from the Building Homes and Jobs Trust Fund for assistance to Counties (as described in Health and Safety Code section 50470 et seq. (Chapter 364, Statutes of 2017 ([SB 2](#)))) related to the PGP Program.

NOW, THEREFORE, THE [CITY COUNCIL/COUNTY BOARD OF SUPERVISORS] OF \_\_\_\_\_  
RESOLVES AS FOLLOWS:





# Attachment 3: Sample Resolution

The attesting officer cannot be the person authorized in Section 4 as the authorized signor.

SECTION 4. The [City Council/County Board of Supervisors] Executive or designee is authorized and directed to execute the [City/County] of \_\_\_\_\_ Planning Grants Program application, the PGP Grant Documents, and any amendments thereto, on behalf of the [City/County] as required by the Department for receipt of the PGP Grant.

ADOPTED \_\_\_\_\_, 2019, by the [City/County] Board of Supervisors of the County of \_\_\_\_\_ by the following vote:

AYES:  
NOES:  
ABSENT:  
ABSTAIN:

\_\_\_\_\_  
County Executive

ATTEST: APPROVED AS TO FORM:



# Final Close-Out Report

Not part of the application; just a reminder!

Pursuant to Section 604 of the Guidelines, each jurisdiction must submit a close-out report summarizing the following aspects of the project(s):

- Brief Summary
- Lead Agency and Partnerships
- Drivers
- Engagement Process
- Challenges
- Outcomes



# Questions?



# Technical Assistance





# TA Program

- PlaceWorks Technical Assistance Team
  - Made up of PlaceWorks, Ascent, Provost and & Pritchard, ILG and Policy Link
- Direct Assistance to Applicants
  - Grant writing (limited)
  - Review of ideas and draft applications
  - Identification of eligible activities
  - Housing element compliance
  - Annual progress reports





# TA Program

- Toolkit and Menu of Services
  - Initial assessment tool
  - Identifies locally appropriate SB 2 eligible activities
- Menu of Services
  - Ex: writing scopes of work, site assessment, revising existing housing approval standards, etc







# Regional TA approach

- Regional Locations
- All city and county governments grouped into 11 statewide regions
- Each region has its own liaison(s)
- Liaisons provide technical assistance for their region and bring in experts for additional assistance







# Regional Liaisons

## SB2 REGIONAL LIAISONS





# OPR: Technical Assistance



- The Governor's Office of Planning and Research (OPR) will be working with HCD and PlaceWorks to provide technical assistance on the topics of planning and CEQA.
- OPR serves the Governor and his Cabinet as staff for long-range planning and research, and constitutes the comprehensive state planning agency. OPR also drafts the CEQA Guidelines.



# OPR: Specific Tools

- General Plan Guidelines Update 2017
- Technical Advisory on CEQA Review of Housing Projects
  - [opr.ca.gov/ceqa/technical-advisories.html](http://opr.ca.gov/ceqa/technical-advisories.html)
- In Progress
  - CEQA Streamlining Map
  - Update of Specific Plan Guidance Document
  - Technical Advisory on Tiering from Plan-level EIRs



# Questions?





# League of California Cities SB2 Planning Grants Webinar

**Karalee Browne**  
Program Manager



INSTITUTE FOR  
LOCAL GOVERNMENT  
FOUNDED 1955

# The Institute for Local Government

**ILG is the non-profit  
education & training  
affiliate of**



**California Special  
Districts Association**  
*Districts Stronger Together*

# What does ILG do?

*Promoting good government at the local level*

## Program Areas

Leadership & Governance

Sustainable Communities

Public Engagement

Youth & Civics Education



## Services

Education & Training

Technical Assistance

Capacity Building

Convening

**Practical, impartial and easy-to-use resources**



# 2019 Housing-Related Initiatives



Affordable Housing



Homelessness



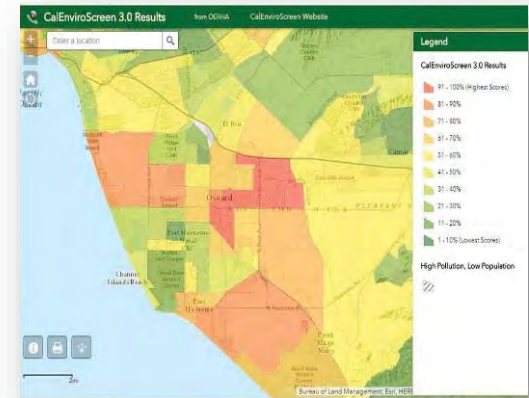
Wildfire & Climate Resilience



Public Engagement Training



Opportunity Zones



Capacity Building in Disadvantaged Communities

# ILG's Role in SB2 Technical Assistance

- Increase awareness about SB2 planning grant availability
- Connect cities with  PLACEWORKS technical assistance
- Document best practices and housing success stories
- Provide a housing-focused community engagement training
- Update the ILG Housing Toolbox





# ILG Affordable Housing Toolbox

## Current Content:

- Building and Design
- Addressing Community Concerns
- Designing Public Participation Process
- Project Design Implementation

## New Content May Include:

- New public engagement strategies
- Innovative housing, like ADUs
- Parking and transportation models



# Innovative Ideas

## *City of Santa Cruz: ADU Program*

- Updated ADU ordinance
  - Engaged architects to create pre-approved prototype plans
  - Hosted community engagement events to educate public
  - Developed “how to” manuals
  - Created partnerships to foster financing options
- \* Learn more in the March issue of *Western City Magazine*



# Innovative Ideas

## City of El Cerrito: Specific Plan

### Plan Highlights:

- Form Based Code that regulates urban development
- Complete Streets Plan
- Infrastructure Analysis for needed improvements
- Environmental Analysis eliminates the need for project specific review

### Plan Outcome:

- Fostered high quality affordable housing

## El Cerrito Affordable Housing Developments



**1** Hana Gardens  
10860 San Pablo Ave - Under Construction  
62 senior units (23 extremely-low, 39 very-low)  
Status: Interest list closed; construction completion est. summer 2018  
Contact: Eden Housing, Inc., (510) 582-1460, [www.edenhousing.org](http://www.edenhousing.org)



**3** Ohlone Gardens  
6431-6495 Portola Dr - Built 2015  
56 low income units (10 units for special needs)  
Status: Wait list closed  
Contact: Resources for Community Development, (510) 526-4000, [ohlone@jSCO.net](mailto:ohlone@jSCO.net)



**2** Metro 510 (Creekside Walk)  
El Cerrito Plaza - Under Construction  
19 affordable units (6 low, 13 moderate)  
Status: Interest list closed; construction completion spring 2018  
Contact: Ravello Holdings, Inc., (510) 629-0326, [Metro510.cd@fpimgt.com](mailto:Metro510.cd@fpimgt.com), [www.liveatmetro510.com/metro-510-el-cerrito-ca/](http://www.liveatmetro510.com/metro-510-el-cerrito-ca/)



**4** Village at Town Center  
10810 San Pablo Ave - Built 2007  
24 moderate income units  
Status: Wait list closed  
Contact: Klingbeil Capital Management, (510) 525-3319, [mjeger@kcmpts.com](mailto:mjeger@kcmpts.com), [www.kcmpts.com/village-at-town-center-el-cerrito-ca](http://www.kcmpts.com/village-at-town-center-el-cerrito-ca)



# Innovative Ideas

## *City of Folsom: Permit Streamlining*

Folsom is proposing physical improvements to a customer service counter:

- New technologies
- Enhanced customer terminals
- Improved web-based platform for zoning information
- Public kiosk for project submittals
- Access to data and public records

### **Nexus to Housing:**

- Planned improvements and software conversion will result in a more efficient, convenient, and cost-effective customer experience to streamline and facilitate housing production.



# Flexible Funding is **Rare!**

## Tips for Success:

- Be **innovative!**
- Stay within the six priority policy areas for faster approval
- Get your application in early (application window is only 8 months)
- Take advantage of technical assistance; it's like having a free consultant!
- Remember, this is a non-competitive, over the counter process for **PLANNING FUNDS**. This opportunity doesn't come along that often!





# Questions?

# Thank you!