

The Regional Housing Technical Assistance (RHTA) Program: An Award-Winning Program Supporting Housing in the Bay Area

EVALUATION FINDINGS - JUNE 2024

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Informing Change



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EXECUTIVE SUMMARY

Recognizing the urgency of California’s housing crisis, the Association of Bay Area Governments and Metropolitan Transportation Commission (**ABAG/MTC**) established the Regional Housing Technical Assistance Program (**RHTA, the RHTA Program, or the Program**) with state funding available through the Regional Early Action Planning Grant of 2019 (**REAP 1.0**). The RHTA Program was introduced in the sixth and latest Housing Element Cycle, the most complex cycle Bay Area housing staff have experienced. It aims to promote housing across the Bay Area’s 109 jurisdictions and aid jurisdictions in creating their state-required Housing Element. Community Planning Collaborative (**CPC**)¹ served as the principal consultant to ABAG/MTC for the Program and engaged a broad array of subconsultants with deep expertise in niche planning topics.

“The sixth cycle was just so different from past Housing Elements. We needed help understanding every step, from the statutory requirements and what that meant [to] how we could identify sites, just getting really into the specifics, [to] what was applicable to which cities and not to others, because the Bay Area is really diverse.”

- JURISDICTION REPRESENTATIVE

BACKGROUND: REGIONAL TECHNICAL ASSISTANCE STRUCTURE

The RHTA Program delivered TA through six different methods to balance these priorities (**Exhibit A**):

EXHIBIT A

The Six Regional Housing Technical Assistance Methods

REGIONAL HOUSING TECHNICAL ASSISTANCE
Data Tools
Regional Training & Products
County Collaboratives
Work Groups
Cohorts
Grants

ABOUT THE EVALUATION

In early 2024, CPC engaged Informing Change to evaluate the RHTA program. Using data from **background documents**, input from an **Evaluation Advisory Group**, **interviews**, **focus groups/group interviews**, and a **survey**, our evaluation explored the following three domains:

1. Technical Assistance Use & Usefulness
2. The Impact of the RHTA Program on Relationships
3. Lessons Learned Administering the RHTA Program

¹ CPC was formerly known as Baird + Driskell Community Planning.

TECHNICAL ASSISTANCE USE & USEFULNESS

Overall, RHTA's TA products, services, and supports helped jurisdictions complete Housing Elements, ensure their compliance with HCD, and lift morale during a challenging time. The majority of survey respondents reported that the tools **helped them do their work (87%), were easy to use (84%), and helped them develop their jurisdiction's Housing Element (79%)**. While ultimately helpful to jurisdictions, some jurisdictions, especially smaller ones, found it difficult to take advantage of the full range of RHTA TA.

Our broader findings on five of the six TA methods (all except Cohorts) follow:

Data Tools

RHTA data tools, such as the as the Affirmatively Furthering Fair Housing (**AFFH**) map, segregation reports, Housing Data Needs Packets, Accessory Dwelling Unit (**ADU**) Affordability Assessment tool, and more, **saved jurisdictions time (81%) and money (75%) and were useful for developing Housing Elements (81%)** by offering solutions to time-consuming data analysis and reporting, **creating efficiency and ease** in an otherwise complex and stressful Housing Element cycle.²

"...through consistent approaches and collaboration among local, regional and state agencies, RHTA has developed many products that both speed HCD's review and sets the stage for addressing important statutory requirements."³

- PAUL McDOUGALL, HOUSING POLICY MANAGER,
CALIFORNIA DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

Interviewees discussed **three common challenges** related to data tools:

1. The **HESS tool** was considered unusable, inaccurate, outdated, unclear, or too generic for their needs.
2. Each jurisdiction created and submitted its Housing Element on a unique timeline, so some **data tools were unavailable** until jurisdictions completed the related Housing Element component.
3. ABAG/MTC did not adequately publicize the program's **overall deliverable timeline** with jurisdictions (i.e., when specific tools would be finalized and available).

Regional Trainings & Products

The RHTA Program **website** and **webinars** allowed jurisdictions within the Bay Area, throughout California, and even throughout the country to benefit from the RHTA Program. While having all RHTA-related resources in one place was important to interviewees, **interviewees tended to agree that the RHTA Program website was difficult to navigate without a search function or simple list of resources and did not meet their needs.**

² Percentages reported from survey results.

³ Association of Bay Area Governments Regional Housing Technical Assistance Program. American Planning Association (APA) California 2023 Awards Application.

The housing topics RHTA addressed during **webinars were timely and relevant to jurisdictions**. Interviewees shared that RHTA’s webinars were the most useful way for jurisdictions to receive information on new and evolving laws because experts delivered the information clearly and they could be referenced or shared after the event.

County Planning Collaboratives

A highlight of the RHTA Program’s overall success is the County Planning Collaboratives. Virtually all survey respondents agreed that the collaboratives provided a space to **share best practices and solutions (98%), foster a sense of camaraderie among housing-focused government professionals (94%), understand or keep up to date with new laws, complex or unfamiliar topics (92%).**

ABAG/MTC and RHTA staff reflect that there may have been skepticism within ABAG/MTC at the start of the RHTA program about the collaborative process and intangible value it brought jurisdictions. However, earlier skeptics now describe the benefit in the form of stronger relationships and certified Housing Elements. County Planning Collaborative Leads also **expanded jurisdictional capacity**, especially for smaller jurisdictions, to complete the complex Housing Element process by bringing expertise and tailoring their scopes of work to specifically meet individual jurisdiction needs.

“We literally could not have [completed the Housing Element] without [the Collaborative], technical support, moral support, and people to call and ask questions. I can't even imagine trying to do it without that.”

- JURISDICTION REPRESENTATIVE

Work Groups

Some interviewees remembered and referenced the work group webinars and meetings directly, while others expressed limited awareness of the work groups. Those who directly referenced the work groups or their activities valued their thematic content. At least two interviewees found it helpful to update housing policies related to the themes addressed in workgroups and consult with experts about those topics in real-time.

Local Grants

In our interviews, over half of jurisdiction staff (57%) explicitly mentioned appreciating and utilizing the REAP suballocations to offset costs incurred during the Housing Element process, including hiring qualified consultants, fulfilling state-required analyses, and utilizing legal services. The funding amount jurisdictions received had no impact on whether or not an interviewee mentioned appreciating the funding—in other words, any amount of funding was better than no funding at all.

Distributing REAP suballocations was a major administrative undertaking for ABAG/MTC. One year after the ABAG Executive Board’s initial approval, only 19 of 109 suballocations had grant agreements fully executed. Program staff identified multiple reasons for such a lengthy agreement process, including high insurance requirements and the protracted contract agreement and execution process.

WEBINAR STATS: 2021-23

- Between the years 2021-23, the RHTA Program hosted **25 webinars**. At the time of this report’s publication, this count has grown to over 30 webinars.
- Representatives from nearly **all Bay Area jurisdictions (100 of 109)** registered for webinars.
- **726 unique individuals** registered for at least one webinar.
- **Post-webinar views** totaled >1,760 views.

THE IMPACT OF THE RHTA PROGRAM ON RELATIONSHIPS

Relationship-building between jurisdictions was one of the most appreciated results of the RHTA Program. County Planning Collaborative meetings facilitated relationship-building by bringing together individuals across the county working toward a common goal. In one instance, new relationships stemming from interactions through the RHTA Program led a group of neighboring jurisdictions to create a shared evacuation plan and plan for future research—a sign that the Program instilled a sense of “being part of something bigger” in jurisdiction staff.

Interviewees highlighted the RHTA Program and its TA materials, offerings, and approaches geared explicitly toward housing staff as contributing factors that helped **improve jurisdictions’ perception of ABAG/MTC**. One jurisdiction even said the RHTA Program’s offerings motivated them to rejoin ABAG/MTC after having left following a negative experience several years ago.

Though the REAP suballocations ABAG/MTC provided to each jurisdiction caused administrative challenges for RHTA program staff, they went a long way toward **building goodwill with jurisdictions by further proving ABAG/MTC’s commitment to all Bay Area jurisdictions**.

“I really feel [ABAG/MTC] listened and did a lot [to] help us navigate this.”

- JURISDICTION REPRESENTATIVE

“So many jurisdictions have Councils of Governments doing a fraction of what ABAG is doing. When they’re looking for resources, they pull up ABAG’s website ... The whole state really looks to what ABAG is doing as a leader.”

- COUNTY PLANNING COLLABORATIVE LEAD

LESSONS LEARNED ADMINISTERING THE RHTA PROGRAM

The arrangement with CPC eased ABAG/MTC’s typical lengthy and paperwork-intensive procurement process⁴ and allowed the RHTA program to deliver an unprecedented volume of TA within the short state-mandated expenditure period. However, the one-time nature of REAP 1.0 funding could not support the expansion of permanent staff. Thus, several time-limited staff were hired to launch the RHTA Program, which was time-consuming for key staff and difficult for new program staff unfamiliar with ABAG/MTC’s policies and practices.

⁴ For example, it took five months for ABAG/MTC to procure CPC.

RECOMMENDATIONS FOR PROGRAM IMPROVEMENT

Informing Change has made a series of recommendations to program staff and others interested in replicating the RHTA Program TA model. These recommendations build on the vast success of the RHTA program. Below, we offer a **selection of these recommendations** (the complete set of recommendations is available in the full report):

Data Tools

- Require less capacity from jurisdictions to populate or use data tools or offer support to populate the data tools.

Website & Webinars

- Adjust the website interface and organization, including a search function and a summary page directing users where to go for specific information to improve the website and overall RHTA tool experience.
- Provide training opportunities in different formats, as needed (e.g., interactive training to practice public speaking and meeting with the public) to maximize learning.

County Planning Collaboratives

- Keep TA contacts consistent, including consultants or subconsultants, collaborative leaders, and core program staff, to support trust-building and ongoing relationship development.
- Explore select in-person opportunities to build regional connections.

Program Administration

- Consider streamlining contracting for grants like those dispersed through the REAP suballocations (i.e., less than \$100,000 to over 100 entities). This could include lowering insurance liability requirements or adding a staff member or adjunct team member to execute and manage the process.
- Use the regional consultant procurement model to achieve economies of scale and ensure adequate support is available for broadly applicable and customized TA needs.
- Include tenured staff members in new programs to help close process knowledge gaps new ABAG/MTC staff experienced during the RHTA Program rollout.
- Continue to honor non-tangible deliverables like brainstorming meetings, thought partnerships, and relationship development that help jurisdictions learn, connect, and develop their Housing Elements.

CONCLUSION & THE FUTURE OF RHTA

This evaluation shows how the RHTA Program successfully expanded the 21 Elements program model to benefit all 109 Bay Area jurisdictions, whether small or large and/or across the urban-rural divide. ABAG/MTC and CPC have honed the TA program model so that, in the words of one ABAG/MTC representative, they *“have institutionalized the infrastructure for delivering TA now being exported to other parts of the agency that have nothing to do with housing.”*

At a minimum, the RHTA Program will continue to assist jurisdictions through 2026 through the REAP 2.0 grant awarded by HCD. However, at the time of this report’s publication (June 2024), the final REAP 2.0 award amount remains unsettled following the 2024-25 state budget negotiations, and ABAG/MTC must secure sizeable and sustainable funding to continue the RHTA Program’s services and support to local jurisdictions.⁵

The RHTA Program has situated ABAG/MTC as a trusted regional partner in housing. Thanks to their initial efforts and investments, ABAG/MTC is positioned to continue providing relevant technical assistance, building a portfolio of tools that meet jurisdictions’ individual needs, and keeping the Bay Area working together.

⁵ Press release from the Southern California Association of Governments: “SCAG warns cuts to housing program will have devastating impact on efforts to address affordability crisis.” May 10, 2024. <https://scag.ca.gov/news/budget-revise-reap-response>



INTRODUCTION

Housing is an urgent issue in California, with economic and population growth outpacing the creation and maintenance of available housing units.¹ Recognizing the urgency of the housing crisis, state government leaders passed various housing policies in 2019 aimed at creating short- and long-term solutions. With state funding available through the Regional Early Action Planning Grant of 2019 (**REAP 1.0**), the Association of Bay Area Governments and Metropolitan Transportation Commission (**ABAG/MTC**) established the Regional Housing Technical Assistance Program (**RHTA, the RHTA Program, or the Program**). ABAG/MTC received Awards of Excellence (first place) from the Northern California and State Chapters of the American Planning Association.²

The RHTA Program promotes housing across the Bay Area’s 109 local jurisdictions by providing technical assistance (**TA**) resources to jurisdictions and building a shared sense of regional priorities to advance regional housing policies. The RHTA Program scales the **21 Elements Collaborative** model³ developed by Community Planning Collaborative (**CPC**)⁴ for San Mateo County to a regional level, providing a large volume of TA, high-quality resources, and visionary leadership as an innovative solution to California’s complex and ever-evolving requirements and housing policies. CPC served as the principal consultant to ABAG/MTC for the RHTA Program and engaged a broad array of subconsultants with deep expertise in niche planning topics.

One of the RHTA Program’s primary goals is to aid jurisdictions in creating their state-required **Housing Element**. Local jurisdictions do not qualify for large, competitive state funding to improve city conditions without a state-approved Housing Element. With sixth cycle Housing Elements due for review by the California Department of Housing and Community Development (**HCD**) in January 2023, the RHTA Program assisted with the most complex cycles most Bay Area housing staff have experienced. The multitude of legislative changes and new statutory requirements, high Regional Housing Needs Assessment (**RHNA**) determination numbers, and the polarizing nature of housing policy suggested that this cycle would differ from past cycles.

With more regulations set in place, jurisdictions across California are finding it harder to accommodate the higher housing targets set by HCD in their updated Housing Element.⁵ These challenges were exacerbated by staffing shortages locally and at HCD and a shortage of qualified consultants to support jurisdictions. Cities and

The RHTA Program delivers technical assistance through the following six methods:

1. Data tools and resources tailored to meet state guidance
2. Regional trainings and products on common topics
3. County Planning Collaboratives that share consultant support
4. Deep dive work groups on hot topics
5. Cohorts of similarly situated jurisdictions like the Big 3 cities in the Bay Area (Oakland, San Francisco, and San Jose)
6. Local suballocations of Regional Early Action Planning Grants (**REAP**) funding

¹ Report from Acting California State Auditor Michael S. Tilden: “State Surplus Property: The State Should Use Its Available Property More Effectively to Help Alleviate the Affordable Housing Crisis.” March 22, 2022. <https://information.auditor.ca.gov/reports/2021-114/index.html#:~:text=Results%20in%20Brief,lacked%20access%20to%20affordable%20housing>.

² ABAG-MTC Receive Award of Excellence from APA California for Regional Housing Technical Assistance Program. October 25, 2003. <https://abag.ca.gov/news/abag-mtc-receive-award-excellence-apa-california-regional-housing-technical-assistance-program>

³ Since 2008, 21 Elements has convened planning staff from the 21 jurisdictions in San Mateo County to support the development of housing policy and its implementation.

⁴ CPC was formerly known as Baird + Driskell Community Planning.

⁵ Report from East Bay Housing Organizations: “Lessons Learned from the Sixth Cycle Housing Element Update in the Bay Area.” February 27, 2024. <https://ebho.org/wp-content/uploads/2024/02/sixth-cycle-housing-element-report.pdf>

counties needed help to obtain informal feedback from their busy HCD reviewers, and many Bay Area jurisdictions needed multiple rounds of review.

In this context, the RHTA Program provided ongoing information regarding the rapidly evolving laws, created a portfolio of TA tools to support jurisdictions through this complex and detailed process, and reduced duplicated costs. These tools and supports, alongside the efforts of housing staff and consultants, have helped Bay Area jurisdictions obtain HCD certification for their Housing Elements while building a regional network of peer-to-peer support.

“The sixth cycle was just so different from past Housing Elements. We needed help understanding every step, from the statutory requirements and what that meant [to] how we could identify sites, just getting really into the specifics, [to] what was applicable to which cities and not to others, because the Bay Area is really diverse.”

- JURISDICTION REPRESENTATIVE

Background: Regional Housing Technical Assistance Structure

One size never fits all when it comes to local implementation of land use and housing policies, especially in a region as diverse as the Bay Area. Accordingly, the RHTA Program was designed to identify a range of “regional value-add” opportunities where it was possible to both achieve economies of scale and support hyper-local priorities. Further, the program prioritized the facilitation of asynchronous learning by busy local planners who could not attend every event (e.g., webinars) in real-time and the creation of a resource library that would be available beyond the expiration of REAP funding. Since its inception, the RHTA Program has produced over 200 pieces of technical assistance at the regional level (not including the separate TA items produced by the County Planning Collaboratives).⁶ The RHTA Program delivered TA through six methods to balance these priorities (**Exhibit 1**).

EXHIBIT 1

The Six Regional Housing Technical Assistance Methods



⁶ See the Index of Available Technical Assistance <https://abag.ca.gov/tools-resources/digital-library/taindexmay2024pdf>

Data Tools

Housing Elements require three sections that involve heavy data collection and analysis: 1) Housing Needs, 2) Sites Inventory, and 3) Assessment of Fair Housing.

1. The **Housing Needs** section must analyze a long list of demographic data and other metrics, mostly using Census data.
2. The **Sites Inventory** identifies land suitable for residential development within the planning period. Suitability involves the analysis of many diverse data sets, including environmental hazard maps, zoning, and access to amenities such as transportation and schools, among others.
3. The **Assessment of Fair Housing** must analyze factors related to segregation, racially or ethnically concentrated areas of poverty, significant disparities in access to opportunity, and disproportionate housing needs.

The RHTA program provided the following data products in an attempt to achieve economies of scale and standardization in data collection to save local planners time and money, allowing them to focus on analysis and local impact:

- [109 editable housing needs data packets](#) pre-reviewed by HCD for consistency with state requirements, including tables, figures, and accompanying text for over 60 data points that could be placed directly into the “Housing Needs” section of the Housing Element;
- [The Housing Element Site Selection Tool \(HESS\)](#) that aggregated a variety of data sets relevant to the “Sites Inventory” into an interactive online tool for local planners; and
- [109 editable Segregation Reports](#) and accompanying datasets that provided segregation measures for both the local jurisdiction and the region using several indices, as required by the Affirmatively Furthering Fair Housing (**AFFH**) guidance issued by HCD.

Regional Training & Products

Housing Elements are generally required every eight years, resulting in a limited pool of public sector staff and consultants with deep experience in their preparation. The RHTA program aimed to address this scenario by tailoring regional TA to tasks that all or most of the 109 local jurisdictions would need to accomplish. This included hosting over 30 webinars on general topics such as “Housing Element 101,” “How to Talk About Housing,” and implementing new housing laws. Regional TA also included customizable, written products for local jurisdiction staff. Example TA offerings include:

- Templates for a Request for Proposals to hire a Housing Element consultant;
- Sample staff reports and slide decks to explain Housing Element requirements to local elected officials and the public; and
- An annual review led by California land use attorneys Goldfarb and Lipman of new housing laws passed during the year's legislative session. In 2023 alone, the New Laws Webinar covered 35 pieces of new housing legislation. This summary of laws led to the creation of additional TA products, including a new housing legislation checklist to identify key local implementation steps, sample application checklists for local jurisdictions to utilize, and sample ordinance language for local jurisdictions to customize to their own context.

County Planning Collaboratives

County Planning Collaboratives (or **Collaboratives**) were designed to support priorities set at the subregional level in recognition of the fact that planning challenges can differ widely across counties; for example, Santa Clara and Solano counties' planning priorities have little in common. The County Planning Collaboratives also aimed to foster a culture of collaboration to inspire jurisdictions to continue to work together after REAP funding is exhausted.

The Collaboratives were partly inspired by 21 Elements, which has convened planning staff from the 21 jurisdictions in San Mateo County to support housing policy development and its implementation since 2008. The award-winning group is facilitated by one consultant, **CPC**, and is funded largely by San Mateo County and the [City/County Association of Governments of San Mateo County](#), with additional funding provided by each participating jurisdiction in an amount prorated by population size.⁷

Funding supported a half-time consultant for each Collaborative to work directly with local planning staff and produce TA relevant to the specific county. Counties with existing shared consulting arrangements (e.g., San Mateo, Santa Clara, and Solano) received funding directly to support their existing work when RHTA began. Marin County (where County staff acted as the shared consultant) and San Francisco (the only single-city county in the region) also received direct funding.

In counties where the concept of shared consultants was new, ABAG/MTC used funding allocations to procure consultants in cooperation with steering committees of local staff. ABAG administered consulting contracts for Contra Costa, Alameda, Napa, and Sonoma counties; given Napa County's small number of jurisdictions, Napa and Sonoma counties were consolidated into one collaborative. ABAG/MTC managed the contracting and invoicing processes, and local staff directed the work of the shared consultant. Additionally, ABAG/MTC staff facilitated monthly regional meetings of the Collaborative consultants to foster peer-to-peer learning and camaraderie.

Collaboratives have produced roundtable discussions with local developers; calculators for determining adequate development sites that remain available during the Housing Element's eight years (e.g. No Net Loss); and data visualization tools to streamline the submittal of Annual Progress Reports to HCD, among others.

Work Groups

Work groups were led by ABAG/MTC-procured consultants and designed to connect local planners around shared projects or challenges, regardless of location. Groups provided specific training and work sessions for jurisdictions adopting similar legislation or working on similar projects (e.g., zoning reform, wildfire planning).

Cohorts

Cohorts were less formal groups designed to facilitate longer-term peer-to-peer networking of planners from similar jurisdictions, such as the "Big 3" cities (San Francisco, Oakland, and San Jose) or agricultural communities, facing unique challenges.



Local Grants

ABAG/MTC provided funding directly to each of the 109 Bay Area jurisdictions, totaling almost \$11 million, to support hyper-local planning priorities such as community outreach or environmental impact reports.

⁷ See more at <https://ccag.ca.gov/>

About the Evaluation

In 2024, CPC engaged Informing Change—a diverse, women-, LGBTQ-, and POC-led strategic learning firm based in Oakland, CA—to evaluate the RHTA program. Our evaluation explored the following three domains:

TECHNICAL ASSISTANCE USE & USEFULNESS	THE IMPACT OF THE RHTA PROGRAM ON RELATIONSHIPS	LESSONS LEARNED ADMINISTERING THE RHTA PROGRAM
<div data-bbox="159 432 599 680"> <p>REGIONAL HOUSING TECHNICAL ASSISTANCE</p> <ul style="list-style-type: none"> Data Tools Regional Training & Products County Collaboratives Work Groups Cohorts Grants </div>		
<p>We assessed the use and usefulness of RHTA's TA products, services, and supports to inform ongoing tool improvements and responsiveness to user needs.</p> <p>We sought feedback and information about the six RHTA program TA methods, including a deeper dive into Data Tools and County Planning Collaboratives.</p>	<p>We explored the impact of the RHTA Program on relationships within and across Bay Area governments, housing experts, ABAG/MTC, and other players developing and implementing state-certified Housing Elements to understand the quality of relationships and how ABAG/MTC can best support the relationship development needed to address the Bay Area's housing needs.</p>	<p>We collected and described lessons learned about implementing and administering a regional TA program to improve RHTA and other TA programs at ABAG/MTC.</p>

See the **Appendix** for a complete list of evaluation questions.

Methods

From January to April 2024, the Informing Change team completed the following activities to inform the creation of this report:

1. **Reviewed and analyzed RHTA background documents** to understand the RHTA Program's context and development. We also analyzed website analytic data, webinar registration, and webinar attendee data that ABAG/MTC staff collected, anonymized, and aggregated.
2. **We met periodically with the Evaluation Advisory Group (EAG)**, which consisted of three CPC and two ABAG/MTC representatives and four County Planning Collaborative leaders and planning directors. The EAG provided advice and input on survey and interview content and outreach. They also participated in a sensemaking session to review and provide input on early evaluation findings.
3. **Facilitated 21 interviews** with jurisdiction representatives who participated in the RHTA Program or received RHTA services.
4. **Conducted three focus groups or group interviews** with eight RHTA Program administration team members and **two focus groups** with ten Community Planning Collaborative leads.
5. **Fielded a survey** to all Bay Area jurisdiction representatives who participated in the RHTA Program or received RHTA services. The survey yielded 72 unique responses from 62 jurisdictions across eight counties (only the county of San Francisco is not represented in the survey data).

Throughout this report, we attribute quotes based on an individual’s role in the RHTA Program and evaluation; otherwise, we keep quotes anonymous to maintain the confidentiality necessary to obtain candid feedback.

See the **Appendix** for full details about the methods.

TECHNICAL ASSISTANCE USE & USEFULNESS

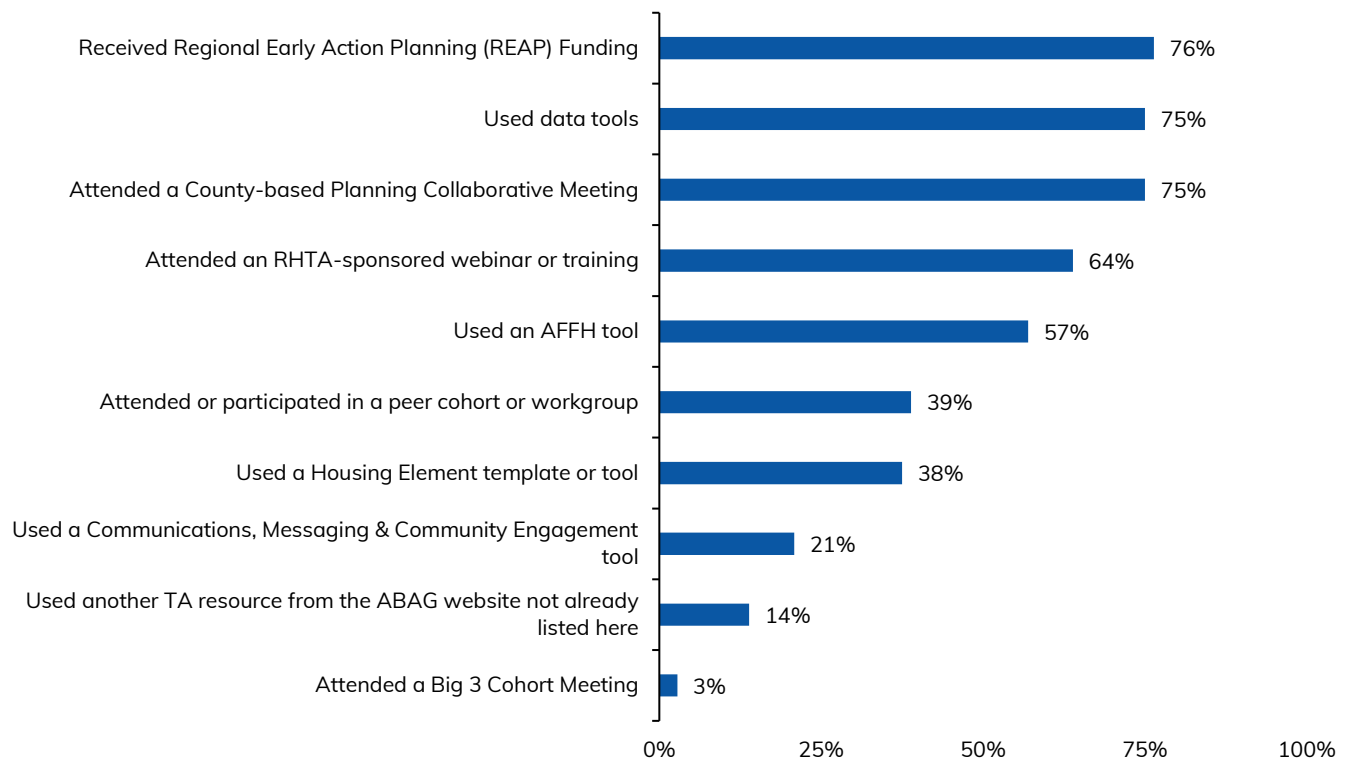


Use of RHTA Technical Assistance

The increased complexity of this cycle’s Housing Element was the principal concern of most interviewees.⁸ The TA resources most used by jurisdictions—mentioned by at least 75% of survey respondents—include REAP suballocation grants,⁹ the data tools, and the County Planning Collaborative meetings (**Exhibit 2**). Overall, these TA products—and the general feeling of being supported by the very agency responsible for distributing the region’s housing needs allocation (**RHNA**) numbers for new housing to each jurisdiction —helped jurisdictions complete Housing Elements, ensure their compliance with HCD, and lift morale during a challenging time.

EXHIBIT 2

Which of the following RHTA resources have you utilized in the past year?
(N=72)



⁸ The concern with the complexity of the Housing Element and its requirements was named in some way by nearly three-quarters of our interviewees.

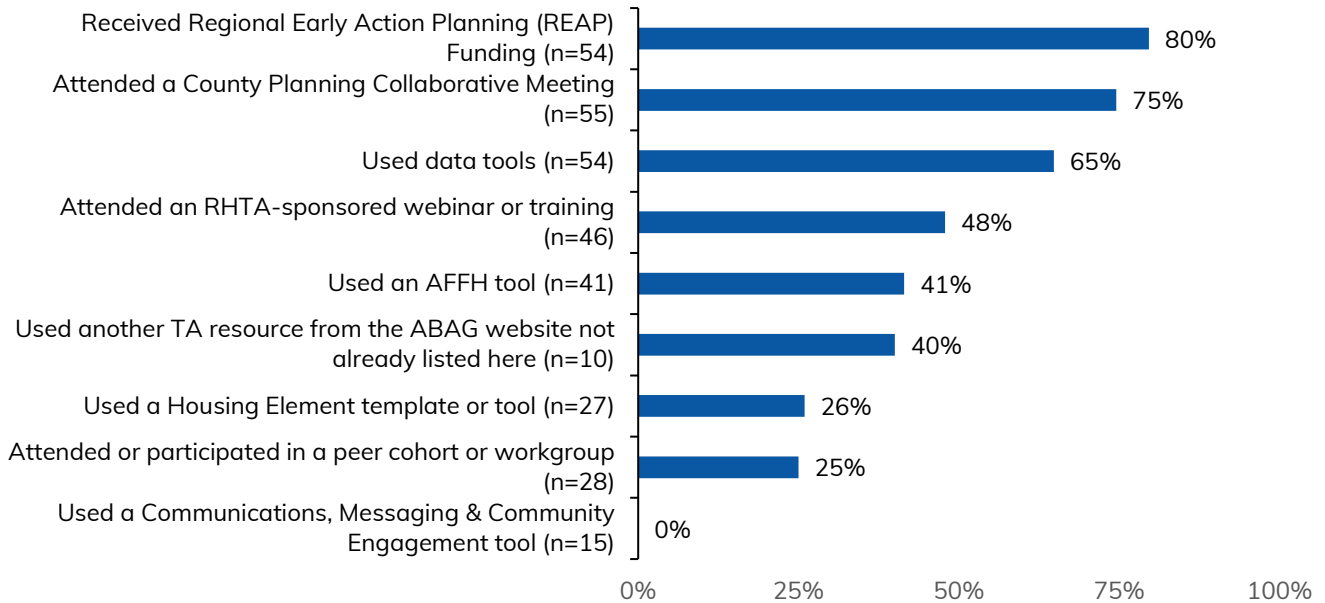
⁹ We know from ABAG/MTC that all jurisdictions received suballocations of REAP funding. In our survey, only 75% of participants reported utilizing REAP funding as part of the suite of TA tools. A small number of respondents who did not mention receiving REAP funds also participated in an interview and did not mention REAP funding during that time either. There could be many explanations for this, including the wording of the question (“Which TA resources have you utilized **in the past year?**”), the survey taker’s familiarity with the funding, or simply forgetting that the funding was a TA resource.

Usefulness of RHTA Technical Assistance

Survey respondents identified REAP funding, county planning collaborative meetings, and data tools as their most useful resources (**Exhibit 3**).

EXHIBIT 3

Please select the top 3 TA resources that have been the most useful to you.
(n=68)



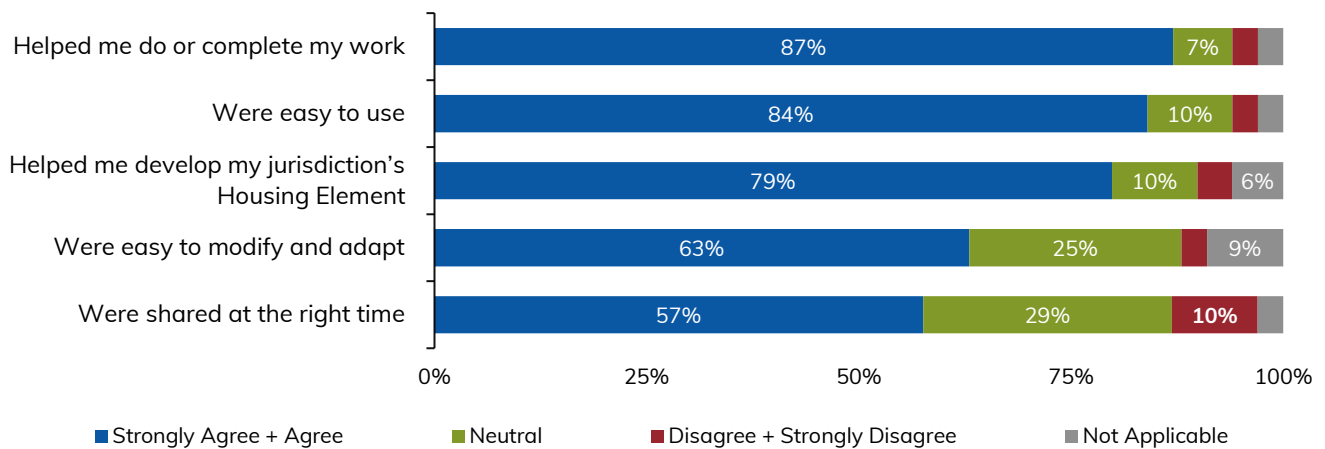
“The success is we eventually did get [our Housing Element] certified within a month of the statutory deadline, so that was a huge win. A large part of that was being able to compare notes with other Bay Area jurisdictions and learn from the consultant teams that ABAG provided through webinars and such.”

- JURISDICTION REPRESENTATIVE

Satisfaction with RHTA Technical Assistance

TA usage across the Bay Area counties points to the successful rollout of a complex TA support ecosystem. Survey respondents were satisfied with the quality and applicability of the TA tools to their work, though timeliness was an issue for some, as discussed later in this report. The majority of survey respondents reported that the tools helped them do their work (87%) and were easy to use (84%) (**Exhibit 4**).

EXHIBIT 4
In general, the TA resources I used...
(n=68)



While ultimately helpful to jurisdictions, some, especially smaller jurisdictions, found it difficult to take advantage of the full range of RHTA TA. One interviewee shared that *“the biggest challenge is always going to be the number of projects we’re all managing locally and trying to balance that with the time it takes to participate in some of these working groups and cohorts. We have a fairly small staff, and we have a lot of projects going on in the city ... The hardest part is finding time to participate in all of these really helpful things.”*

Next, we explore the successes and challenges of five of the RHTA Program’s six TA methods: Data Tools, Regional Trainings & Products, County Planning Collaboratives, Work Groups, and Grants.¹⁰

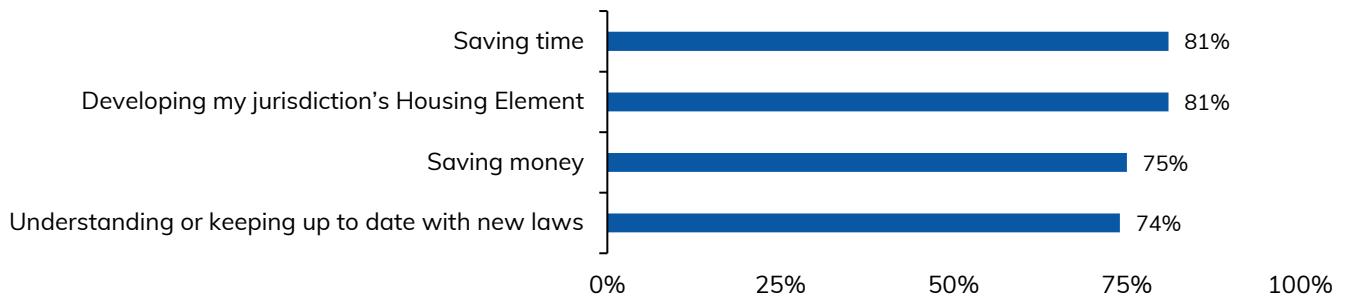
¹⁰ The evaluation surfaced limited information about cohorts, and we do not report that information in this report.

Data Tools

The RHTA data tools, such as the AFFH map, segregation reports, Housing Data Needs Packets, ADU Affordability Assessment tool, and more, saved jurisdictions time and money by offering solutions to time-consuming data analysis and reporting (**Exhibit 5**). Like many TA offerings, one advantage of these tools is that staff working directly on the Housing Element could use them, as could the consultants working with jurisdictions to develop their Housing Elements, and so could other housing staff working in California outside the Bay Area.



EXHIBIT 5
The templates and data tools I used were useful for:
(n=53)



Interviewees shared that the templates and tools pre-approved by HCD (e.g., ADU affordability assessment tool, AFFH analysis, Housing Needs Data Packet) were a great benefit to jurisdictions. Perhaps most importantly, materials conforming to HCD requirements could be accepted upon first submission, expediting certification and freeing jurisdictions' time to focus on other important activities, like community engagement and seeking community input. Creating ease in the certification process helped alleviate some stress jurisdictions felt through this difficult Housing Element cycle. The templates and tools also helped jurisdictions complete analysis and Housing Element components quickly and accurately. One HCD representative said, *"Through consistent approaches and collaboration among local, regional, and state agencies, RHTA has developed many products that both speed HCD's review and set the stage for addressing important statutory requirements."*¹¹

"We knew HCD had blessed [the data package with housing needs assessment data]. We weren't going to have to reinvent that wheel."

- JURISDICTION REPRESENTATIVE

These tools and templates were particularly helpful to jurisdiction staff who were new to the Housing Element process or needed more housing expertise. The tools, especially introductory tools like the Housing Element checklist, helped jurisdictions navigate a complicated process and stay organized.

Analysis shows variance in the uptake of data and Housing Element tools and templates related to jurisdiction size (based on population) but similar usefulness ratings across jurisdictions of all sizes. Small jurisdictions utilized data tools more frequently than large jurisdictions: 100% of small jurisdictions completing the survey reported using the data tools compared to only 72% of medium and large jurisdictions.¹² A similar proportion of jurisdictions agreed that the data tools, REAP funding, and County Planning Collaboratives were the most useful

¹¹ Association of Bay Area Governments Regional Housing Technical Assistance Program. American Planning Association (APA) California 2023 Awards Application.

¹² Here, small jurisdictions are defined as those with a population of 100,000 or less, and medium and large jurisdictions are those with a population greater than 100,000.

TA products. When asked to select the top three most useful tools, we found no significant differences among the most useful tools for small jurisdictions compared to medium and large jurisdictions.

Interviewees also described three common challenges related to the data tools:

Common Challenge #1: HESS Tool

While most data tools are beneficial to jurisdictions, **the HESS tool is** an exception. In interviews, jurisdictions identified potential for the HESS tool but did not find it usable as it was prepared during this Housing Element process. Jurisdictions reported that some information was inaccurate, outdated, unclear, or too generic for their use. Because jurisdictions worked on their own timelines, the tool was available when only relevant to some jurisdictions. Finally, the HESS tool also required significant time and resources from ABAG/MTC and jurisdictions to create and implement, which was difficult for jurisdictions, especially smaller ones, to commit to the project due to limited capacity. However, HESS did lead to the creation of the public-facing Housing and Land Use Viewer (**HLUV**), which consolidated a wide variety of regional data sets on local zoning, environmental hazards, transportation, and much more into a format more easily accessible to people who are not trained data scientists. As of this report’s publication, HLUV is available to the public and intended to remain available. The tool and standardized format of the RHTA data packets and segregation reports will help planners, academics, and advocates for years to come.

Common Challenge #2: Lack of Timeliness

Each jurisdiction created and submitted its Housing Element on a unique timeline, so some data tools were unavailable until jurisdictions completed the related Housing Element component. As a result, some interviewees could not plan for, use, or benefit from the RHTA resources. For ABAG/MTC, it was challenging to determine which products to prioritize first or hard to justify working on a particular product if only some and not all jurisdictions would benefit from it (based on timing).

Common Challenge #3: Deliverable Timeline Communication

ABAG/MTC did not adequately publicize the program’s overall deliverable timeline with jurisdictions (i.e., when specific tools would be finalized and available). While this approach gave ABAG/MTC flexibility, it left jurisdictions with insufficient information to plan as much as they would have liked and sometimes led to duplicated efforts subregionally.

“The confusing part is, I have found before developing products or deliverables for jurisdictions that we're pretty far down the road [when] we find out that ABAG is doing it in conjunction with other consultants. That's been confusion that leads to frustration; it's a clear duplication of effort.”

– ABAG/MTC COUNTY COORDINATOR

Regional Trainings & Products

RHTA Program Website

The RHTA Program **website** (and webinars, which we will discuss next) allowed jurisdictions within the Bay Area, throughout California, and even



throughout the country to benefit from the RHTA Program. The website served as a resource for all Bay Area jurisdictions and received 7,057 visits from 2021-23, with the most viewers coming from jurisdictions within the Bay Area’s largest counties (San Francisco, Alameda, and Santa Clara). Website use peaked in 2022, while jurisdictions were most intensely focused on drafting their Housing Elements.

The website also welcomed 4,609 visitors from California outside the Bay Area (e.g., Culver City, Fayetteville, Folsom, Inglewood, Modesto, Monterey) and from other states (e.g., Seattle, WA, to as far east as Pittsburgh, PA, Buffalo, NY, and Wilmington, DE).

Beyond the landing page, the five most-visited RHTA webpages included the 1) training schedule and links, 2) SB 9 Landing page, 3) templates, 4) Housing Element checklist, and 5) overview of AB 2011 and SB 6.

While having all RHTA-related resources in one place was important to interviewees, **interviewees tended to agree that the RHTA Program website was difficult to navigate and did not meet their needs.** The website lacked a search function, and interviewees shared that resources were difficult to find when jurisdictions needed them. ABAG/MTC hosted RHTA-related webpages on the ABAG/MTC website and was, therefore, bound by the structure and functionality of the agency’s already-existing website.

RHTA-Created Webinars

Webinars served as mechanisms to reach a broad audience and communicate relevant and helpful information that could be accessed at jurisdictions’ convenience. The housing topics the RHTA Program addressed during webinars were timely and relevant to jurisdictions, which faced challenges keeping track of new laws and complying with state and local requirements while completing the Housing Element. Interviewees shared that RHTA’s webinars on these topics were the most useful way for jurisdictions to receive this information because the information was delivered clearly and simply by experts, webinar attendees could ask questions in real-time, and the webinars could be referenced later and shared with others.

Between the years 2021-23, the RHTA Program hosted **25 webinars**. At the time of this report’s publication, this count has grown to over 30 webinars. Representatives from nearly all Bay Area jurisdictions (100 of 109) registered for these webinars. Like the website, the webinars reached individuals in California beyond the Bay Area and throughout the country. Registrants and viewers included local jurisdiction, consultant, nonprofit, and regional representatives throughout the Bay Area and in cities such as San Diego and Chula Vista. In total, **726 unique individuals registered for at least one RHTA webinar** (including 26 potentially duplicated individuals). Webinars averaged 123 registrants, each person having registered for 1-3 webinars.¹³ **Table 1** lists the five webinars from 2021-23 with the highest number of registrants.

TABLE 1
Top Five RHTA Webinars by Number of Registrants, 2021-23

WEBINAR TITLE	YEAR	# OF REGISTRANTS
New State Housing Laws Overview	2023	507
Using Data Effectively in Housing Element Updates	2021	219
Creating Capacity: An Overview of the Sites Inventory	2021	192
Overview of AB 2011 and SB 6	2023	151
Housing Element 101 Nuts and Bolts	2021	146

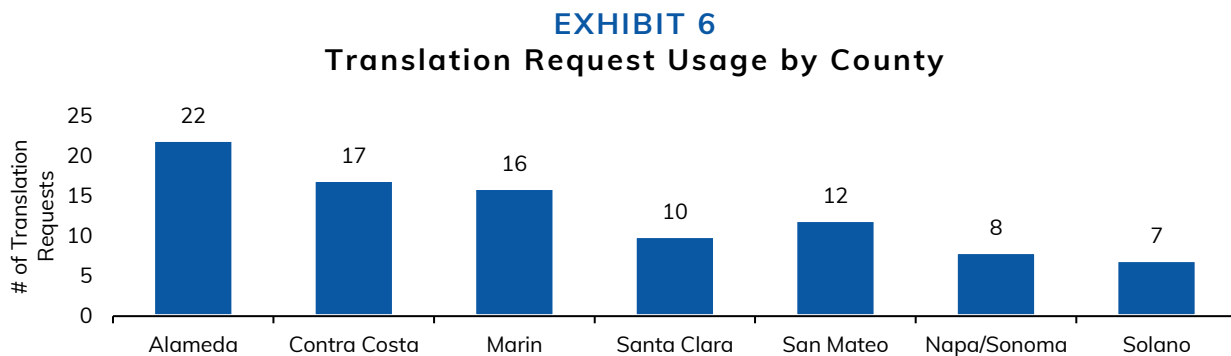
¹³ Excluding the webinar on Symbium, which drew 12 registrants: webinars averaged 123 registrants. “Talking with the Media about Housing” drew the fewest registrants (45, in 2022).

One benefit of hosting webinars is that they can be recorded, shared, and viewed after the live event ends. RHTA hosted webinar recordings on YouTube and via Box. There have been over 1,760 views of the webinar recordings through January 2024. Having the webinars available online after the event ended was also helpful so jurisdictions could review or share them with other staff. Multiple County Planning Collaborative leads also shared that because jurisdictions were all on different timelines, the topics most relevant to each jurisdiction changed over time; lower attendance on a webinar could have meant limited interest in the topic only at that specific moment while becoming more useful and informative later in the Housing Element cycle. Local councils also influence what jurisdictions work on and when.

Jurisdictions appreciated webinars with different presentation mechanisms, including interactive webinars and breakout groups for deeper discussion. Breakout rooms during webinars also created the opportunity for jurisdictions to meet one another and discuss common challenges, though less commonly discussed than collaboratives. Attending the webinars live was helpful so jurisdictions could ask questions as they arose.

Translation Services

Thirty-four jurisdictions across eight of nine Bay Area counties took advantage of **translation services** offered by RHTA, totaling 92 requests (**Exhibit 6**).¹⁴ Jurisdictions used the services to translate a range of materials such as presentations, surveys, materials for farmer’s market tabling, virtual workshops, captions for videos, website text, and meeting minutes. Materials were translated into ASL, Cantonese, Farsi, Filipino, Mandarin, Samoan, Spanish, Simplified Chinese, Tagalog, and Vietnamese.



County Planning Collaboratives

A highlight of the RHTA Program’s overall success is the County Planning Collaboratives. In our interviews with jurisdictions, all interviewees mentioned the Collaboratives as an important source of peer support and a space for shared analysis and information exchange. Virtually all survey respondents agreed that the collaboratives provided a space to share best practices, foster a sense of camaraderie, and learn about new housing laws (**Exhibit 7**).

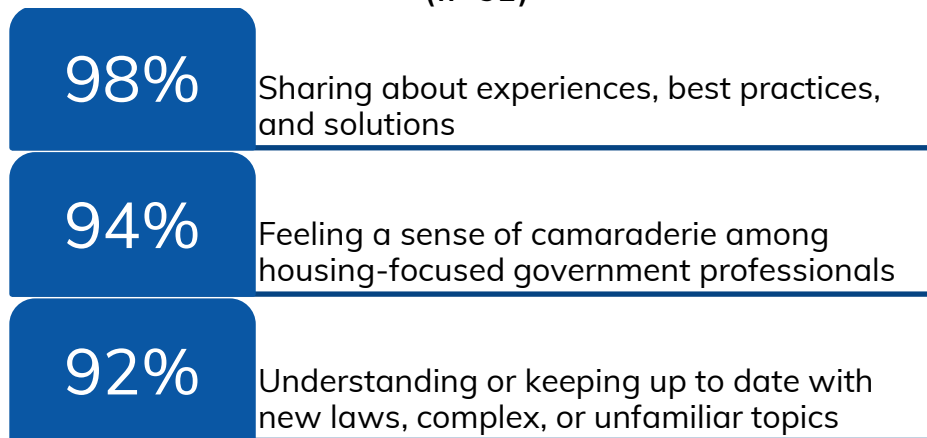


Interviewees reflected that the monthly cadence worked well to maintain momentum and interest and helped jurisdictions contextualize their work by hearing from their peers, comparing and making sense of notes and comments from HCD, and sharing best practices.

¹⁴ Requests from Napa and Sonoma are combined in **Exhibit 6**.

EXHIBIT 7

The County Planning Collaboratives were useful for...
(n=52)



“A lot of times, jurisdictions don't recreate the wheel. We look for best practices and ask for things other cities are doing; if they're willing to share, we look at those different tools that are available and pick and choose what works for our jurisdiction. That's been really beneficial to know what tools are out there, who has them, and to be able to reach out to them directly.”

- JURISDICTION REPRESENTATIVE

Consultants in the REAP-funded consultant pool facilitated the County Planning Collaboratives (in addition to hosting webinars and developing RHTA-created tools). Together, they expanded jurisdictional capacity, especially for smaller jurisdictions, to complete the complex Housing Element process. These qualified consultants brought expertise and tailored their scopes of work to specifically meet individual jurisdiction needs and address the Housing Element sections of greatest need in each jurisdiction. Interviewees shared that the consultants provided quick responses to complex questions, completed sections, wrote select portions, served as peer reviewers on the Housing Element, and alleviated the time-consuming need to go through expensive and often unsuccessful individual procurements.

“We literally could not have [completed the Housing Element] without [the Collaborative], technical support, moral support, and people to call and ask questions. I can't even imagine trying to do it without that.”

- JURISDICTION REPRESENTATIVE

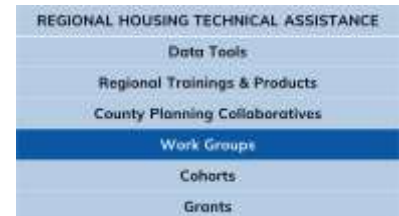
The RHTA program's deliverables were often intangible, including activities like preparing for and facilitating meetings. Collaborative leads reflect that it was hard to demonstrate their work when ABAG/MTC would typically expect a tangible deliverable, like a document containing a plan or a report. ABAG/MTC and RHTA staff reflect that there may have been skepticism within ABAG/MTC at the start of the RHTA program about the collaborative process and intangible value it brought jurisdictions. However, earlier skeptics now describe the benefit in the form of stronger relationships and certified Housing Elements.

“Because we were early in the adoption cycle, providing our experience to other collaborative members was beneficial to the group because we had been through so many rounds of reviews with HCD that we were able to provide support to other cities that needed it. I had other cities reach out after those collaborative meetings that wanted to specifically talk about some of the programs included in our Housing Element.”

- JURISDICTION REPRESENTATIVE

Work Groups

Work groups provided jurisdictions with specific opportunities to explore and address topics relevant to their jurisdictions and Housing Elements. They differed from webinars because they included a series of workshops or webinars on one specific theme. Work groups also differed from County Planning Collaboratives because all jurisdictions could access any work group, regardless of location. Interviewees valued both attributes – longer-term experiences that are open to the entire Bay Area region.



Interviewees found the work groups helpful as they updated their Housing Elements and created policies and procedures for their jurisdictions. One interviewee found it helpful to update their jurisdiction’s inclusionary housing ordinance in the work group and benefited from consulting with experts and asking questions in real-time. Another interviewee shared a similar story about making Housing Element updates informed by the equity work group.

Interviewees did not consistently refer to “work groups” as such, nor did they consistently draw a clear distinction between the webinars provided as part of the work groups compared to other RHTA webinars. The evaluation data did not provide insight into how limited awareness was amongst jurisdictions, or whether jurisdiction representatives were unfamiliar with the term “work groups” even if they were familiar with the work groups’ activities. For example, interviewees would reference the “series” on wildfire or the webinar about inclusionary housing policy. At least one interviewee was unaware of how to take advantage of the work groups: *“I’m looking at the list [of TA offerings] and there’s some things on here I’m not really aware of ... The peer cohorts and work groups, I don’t even know what to do to be able to take advantage of that.”*

Given the limited time in interviews, the evaluation did not get to explore work groups more deeply with jurisdiction representatives.

Grants

ABAG/MTC provided each jurisdiction with a REAP suballocation grant of at least \$20,000. Some jurisdictions received additional funds based on their RHNA numbers, and a small number applied for and received competitive grants open to all jurisdictions. In our interviews, over half of jurisdiction staff (57%) explicitly mentioned appreciating and utilizing the funding to offset costs incurred during the Housing Element process, including hiring qualified consultants, fulfilling state-required analyses, and utilizing legal services.



The funding amount jurisdictions received had no impact on whether or not an interviewee mentioned appreciating the funding—in other words, any amount of funding was better than no funding at all.¹⁵ Survey data and interviewees with jurisdictions provide evidence that even small amounts of funding gave jurisdictions a sense of support and allowed some flexibility in their budget. However, some administrative staff and select jurisdictions felt a larger grant was necessary to justify the required workload for both ABAG/MTC and local jurisdictions to administer and receive grant funding.

“Some of the money from REAP that came directly to [our jurisdiction] paid for the environmental impact report, outreach consultants, and for various parts of the expensive Housing Element process.”

- JURISDICTION REPRESENTATIVE

Distributing REAP suballocations was a major administrative undertaking for ABAG/MTC. A team of three worked quickly and diligently to create and execute 109 grant contracts for the suballocations. The time-consuming process took the team’s time away from other important RHTA-related responsibilities, like communicating with jurisdictions about the program overall, its goals, and projected activities. Further, one year after the ABAG Executive Board’s initial approval, only 19 of 109 suballocations had grant agreements fully executed. Program staff identified the following reasons for such a lengthy agreement process:

- Grant requirements did not seem commensurate with the grant terms (i.e., ABAG/MTC has high insurance requirements that are difficult for local jurisdictions to meet).
- It took more time than anticipated for Program staff to negotiate individualized statements of work for each grant agreement.
- Program staff found many jurisdictions were not far enough in their Housing Element process to determine the precise use for their costs, a detail that administrative staff expected to include in the grant agreements. Rather than requiring details up front, staff adjusted the grant agreements to allow for updates on costs associated with the recipient’s Housing Element.
- Grants required eight internal ABAG/MTC approval stages and the agency’s Executive Director’s signature. Once contracts were executed, any amendment to the initial grant language, including minor amendments such as contract date extensions, was required to route through ABAG/MTC’s finance and legal departments for approval.

SUCCESSSES OF OTHER TA PRODUCTS

The RHTA Program produced and supported a handful of additional TA products and supports to keep jurisdictions informed about changing laws and provide space to collaborate. Interviewees talked less frequently about the following TA components, though they are worth mentioning as they round out RHTA’s suite of services:

- **Communication and community engagement tools**, including the Balancing Act Tool, helped jurisdictions communicate effectively with their communities and council members to garner support for the housing work and employ interactive tools that illuminated housing complexity
- **TA email responses and drop-in hours** allowed recipients to get quick and expert answers to housing questions.
- **Weekly email updates** were an excellent way to provide information and updates that otherwise might have gotten lost.

¹⁵ On average, jurisdictions interviewed for the evaluation received \$15,000 in supplemental RHNA-based funding (on top of the \$20,000 allocation every jurisdiction received).

THE IMPACT OF THE RHTA PROGRAM ON RELATIONSHIPS



Relationship-building between jurisdictions was one of the most appreciated results of the RHTA Program. County Planning Collaborative meetings facilitated relationship-building by bringing together individuals across the county working toward a common goal. In addition to talking about the peer support they received through the collaboratives, interviewees appreciated the space to connect with their peers and form relationships with staff doing similar jobs that don't often get to meet (typically, when county or jurisdiction staff meet, it is at the director level without the option for "frontline" staff to participate).

In one instance, new relationships stemming from interactions through the RHTA Program led a group of neighboring jurisdictions to create a shared evacuation plan and plan for future research—a sign that the Program instilled a sense of "being part of something bigger" in jurisdiction staff.

The opportunity to share with peers also demystified jurisdictions' contexts, such as why RHNA numbers were higher or lower in certain areas. This resulted in decreased competition and resentment and a deeper understanding and compassion among jurisdictions. Some interviewees stated they were interested in continuing to build relationships with each other and with jurisdictions throughout the Bay Area, and one suggested that all counties come together, no more than quarterly, to network and share updates.

"[Jurisdictions are] more interested in working together because they're realizing their similarities."

- COUNTY PLANNING COLLABORATIVE LEAD

Interviewees highlighted the RHTA Program and its TA materials, offerings, and approaches geared explicitly toward housing staff as contributing factors that helped improve jurisdictions' perception of ABAG/MTC. Many interviewees had neutral perceptions of or minimal knowledge about ABAG/MTC before receiving support from the RHTA Program. The Program's existence and reach, combined with program staff's responsiveness and ABAG/MTC's willingness to update resources and tools, demonstrated a refreshed commitment to housing and the agency's intent to meet jurisdictions' needs.

Jurisdictions noted the effort and attention. One jurisdiction even said the RHTA Program's offerings, from tools and connections to funding and an overall improved relationship, motivated them to rejoin ABAG/MTC after having left following a negative experience several years ago.

"I really appreciate how [ABAG/MTC has] obviously listened to input that preceded this whole Housing Element because they would have meetings I would attend where they were scoping out, 'What do you need? How can we help?' Given the hundred or so jurisdictions in the Bay Area, I'm sure they heard a lot of different things. I appreciate the work they did because I really feel they listened and did a lot [to] help us navigate this."

- JURISDICTION REPRESENTATIVE

Though the REAP suballocations ABAG/MTC provided to each jurisdiction caused administrative challenges for RHTA program staff, they went a long way toward building goodwill with jurisdictions by further proving

ABAG/MTC's commitment to all Bay Area jurisdictions. ABAG/MTC staff felt that giving each jurisdiction a suballocation was important to support the region fully and build a relationship with jurisdictions across the county. This commitment has yielded a positive return on investment (including ABAG/MTC's financial investment and investment in staff time) in the form of strengthened relationships.

“Knowing that [ABAG/MTC is] the group behind the collaborative and behind the working group makes me think more positively about [their] assistance to the cities as part of this update process. Cities have to fund our Housing Element updates ... The monetary assistance from those grants [REAP and LEAP] were really helpful.”

- JURISDICTION REPRESENTATIVE

LESSONS LEARNED ADMINISTERING THE RHTA PROGRAM

The RHTA Program relied on contracted consultants and subconsultants to deliver most TA services and create TA products; CPC, the principal consultant and contractor, contracted a broad array of subconsultants with deep expertise in niche planning topics to meet jurisdictions' housing needs. This principal consultant/subconsultant arrangement eased ABAG/MTC's typical lengthy and paperwork-intensive procurement process¹⁶ and allowed the RHTA program to deliver an unprecedented volume of TA within the short state-mandated expenditure period.



The one-time nature of REAP 1.0 funding could not support the expansion of permanent staff. Thus, several time-limited staff were hired to launch the RHTA Program. This was quite time-consuming and required key staff, including the Program Manager, to spend an extraordinary amount of time on hiring and administration instead of program design and delivery. Because most RHTA Program staff were new to ABAG/MTC, they were unfamiliar with the agencies' policies and practices that often were not documented, which led to frustration and difficulty as staff figured them out. The team is now much more familiar with the policies and practices and is prepared for another round of TA support.

The RHTA Program team also felt the isolation that the COVID-19 pandemic restrictions brought, which further exacerbated their challenges. Due to local restrictions put in place in 2020 as the RHTA Program launched, staff could not work from the same space, limiting their ability to build connections as a new team and troubleshoot together. Staff felt the impact of this distance, particularly on morale, teamwork, and collective problem-solving.

RECOMMENDATIONS FOR PROGRAM IMPROVEMENT

Building on the vast success of the RHTA Program, we offer the following recommendations focused on program improvement to program staff and others within and outside ABAG/MTC who are interested in replicating the RHTA Program TA model.

¹⁶ For example, it took five months for ABAG/MTC to procure CPC.

Data Tools

- Continue to offer data tools, given their general success and helpfulness to jurisdictions, especially smaller jurisdictions.
- Improve upon tech-based tools like HESS to be more user-friendly, timely, accurate, customizable, and editable.
- Require less capacity from jurisdictions to populate or use data tools, or offer support to populate the data tools.
- When implementing broad-scale TA and support services, determine which needs are universal across jurisdictions and which are unique to provide the right balance of generic and context-specific resources. For example, RHTA-created templates and data packets that provided near-pre-approved language and sections to complete with information specific to jurisdictions eased the burden on jurisdictions to produce approval-ready content that also included their jurisdiction-specific data.

Website & Webinars

- Continue to provide RHTA resources in one central location.
- Adjust the website interface and organization, include a search function, and potentially include a summary page directing users where to go for specific information (similar to the [Index of Technical Assistance](#) ABAG/MTC produces) to improve the website and overall RHTA tool experience.¹⁷
- Notify website users (in the case of RHTA, jurisdictions) about major website changes and updates via email or other methods.
- Provide training opportunities in different formats, as needed (e.g., interactive training to practice public speaking and meeting with the public) to maximize learning.
- Offer breakout groups and webinars for specific audiences (e.g., by jurisdiction size, population types, county, on specific topics) to make conversation most relevant to trainees.

County Planning Collaboratives

- Keep TA contacts consistent, including consultants or subconsultants, collaborative leaders, and core program staff, to support trust-building and ongoing relationship development.
- Share a contact list of all participants to ease communication.
- Explore select in-person opportunities to build regional connections.

Program Administration

- Consider streamlining contracting for grants like those dispersed through the REAP suballocations (i.e., less than \$100,000 to over 100 entities). This could include lowering insurance liability requirements or adding a staff member or adjunct team member to help execute and manage the process.

¹⁷ [Index of Technical Assistance](#)

- Use the regional consultant procurement model to achieve economies of scale and ensure adequate support is available for broadly applicable and customized TA needs.
- Invest in support at multiple levels, including staff dedicated to the RHTA Program, county support, and jurisdiction support. Having one staff member who can regularly respond to questions and help requests will ensure consistency, reliability, and trust in the RHTA Program and ABAG/MTC.
- Include tenured staff members in new programs to help close process knowledge gaps new ABAG/MTC staff experienced during the RHTA Program rollout.
- Continue to honor non-tangible deliverables like brainstorming meetings, thought partnerships, and relationship development. These opportunities were important to jurisdictions as they created and developed their Housing Elements and addressed community needs.
- Share a calendar of events and expected deliverables in advance to help jurisdictions know what to expect and plan accordingly.

CONCLUSION & THE FUTURE OF THE RHTA PROGRAM

This evaluation shows how the RHTA Program successfully expanded the 21 Elements program model to benefit all 109 Bay Area jurisdictions, whether small or large and/or across the urban-rural divide. The program’s extensive technical assistance portfolio, including information-based services, data tools, Housing Element templates, and peer groups, aided jurisdictions in completing the most complex Housing Element cycle in recent history, saving jurisdictions time and money and boosting morale.

ABAG/MTC and CPC have honed the model so that, in the words of one ABAG/MTC representative, they “*have institutionalized the infrastructure for delivering TA now being exported to other parts of the agency that have nothing to do with housing.*” The RHTA Program is already serving as a model for future TA programs in the international playing field; RHTA’s Program Manager was invited to Vancouver, Canada to speak to local jurisdictions and nonprofits about designing regional TA to coordinate and expedite the implementation of the province’s new laws allowing small-scale multi-unit housing and increased density in transit-oriented development areas. RHTA staff is also working closely with Bay Area Housing Finance Authority (BAHFA) staff to deliver TA to Bay Area jurisdictions to plan for the smooth administration of \$20 billion in potential bond funding for housing should an upcoming ballot measure pass in November 2024.

“So many jurisdictions have Councils of Governments doing a fraction of what ABAG is doing. When they’re looking for resources, they pull up ABAG’s website... The whole state really looks to what ABAG is doing as a leader.”

- COUNTY PLANNING COLLABORATIVE LEAD

The RHTA Program’s success at building relationships across jurisdictions and with ABAG/MTC has been a great programmatic hallmark that will last beyond the sixth Housing Element cycle and implementation. The relationships will be immediately important in Bay Area housing because ABAG/MTC relies on local jurisdiction partners to co-implement many of the strategies articulated in Plan Bay Area 2050, the 30-year regional plan that ABAG/MTC produces as the region’s Regional Transportation Plan (a federal requirement) and Sustainable Communities Strategy (a state requirement).¹⁸

¹⁸ Plan Bay Area 2050 website: <https://planbayarea.org/>

At a minimum, the RHTA Program will continue to assist jurisdictions through 2026 through the REAP 2.0 grant awarded by HCD. REAP 2.0 was created by the Legislature in 2021; however, several factors have contributed to a delay in continuing the RHTA Program's activities between grant cycles. Most significantly, at the time of the writing of this report in June 2024, the final REAP 2.0 award amount remains unsettled following the 2024-2025 state budget negotiations. As a result, the RHTA Program has lost momentum, with program activities and procurements on hold until the state budget is finalized. Beyond REAP 2.0, ABAG/MTC must secure sizeable and sustainable funding to continue the RHTA Program's services and support to local jurisdictions.¹⁹

The RHTA Program has situated ABAG/MTC as a trusted regional partner in housing. Even as interviewees navigate Housing Element implementation, they identify an ongoing need for support like the RHTA Program, which provides relevant and cost-saving services. Thanks to their initial efforts and investments, ABAG/MTC is positioned to continue providing relevant technical assistance, building a portfolio of tools that meet jurisdictions' individual needs, and keeping the Bay Area working together.

“We have a better Housing Element from receiving [RHTA] services ... [if] the task of implementing the various programs and objectives of the Housing Element gets passed on to another planner, the knowledge that those resources are there to help in guiding and educating our jurisdiction ... to help us sail through it smoothly is very useful for us.”

- JURISDICTION REPRESENTATIVE

¹⁹ Press release from the Southern California Association of Governments: “SCAG warns cuts to housing program will have devastating impact on efforts to address affordability crisis.” May 10, 2024. <https://scag.ca.gov/news/budget-revise-reap-response>



Appendix:

Evaluation Questions & Methods

EVALUATION QUESTIONS

Informing Change prioritized the following questions for the RHTA Evaluation:

1. In what ways, and to what extent, were the RHTA Program's **Technical Assistance products and services** effective, timely, used, and useful?
 - a. Which elements were most helpful?
 - b. Are there any patterns in who found the programs most useful, such as geography, agency type, etc.?
2. How, and in what ways, did the RHTA Program affect **changes in relationships** across and within the region?
 - a. Are these changes experienced by jurisdictions, counties, subregions, and/or regionally?
3. What did ABAG do well, and what could improve their **program implementation and administration**?
 - a. What factors supported or inhibited their efforts?

METHODS

From January 2024 to April 2024, Informing Change completed the following activities to inform the creation of this report:

1. **Background RHTA document review:** We reviewed program documentation RHTA staff collated to understand how and why the RHTA Program developed, the scope of the resources RHTA created and provided, feedback gathered to date, and changes made throughout the Program. Background documents include but are not limited to: REAP annual reports to California Department of Housing and Community Development (**HCD**), project charters, survey results, and budget updates.
2. **Advisory committee meetings:** We sought input from an Evaluation Advisory Group (**EAG**), consisting of CPC and ABAG/MTC representatives and four representatives who work in jurisdictions or as County Planning Collaborative Lead consultants. One of the four representatives is both a jurisdiction representative and a County Planning Collaborative Lead. The EAG met twice throughout the evaluation and provided feedback on the survey and interview content and wording to ensure that the intended jurisdiction audience would be familiar with the chosen text, developed a plan for and conducted survey outreach to their County Planning Collaboratives to ensure survey completion, and participate in a sensemaking session to review preliminary evaluation results to ensure the findings we produced from the evaluation are contextualized by those who have a deep understanding of the program and housing field.
3. **Interviews & Focus Groups:** To understand the nuance behind broad trends and explore changes in relationships (questions that don't always work well in survey forms), we conducted interviews with two key audiences: 1) individuals who received the RHTA Program's technical assistance and engaged with RHTA's offerings, 2) individuals who helped develop RHTA's TA products or provide RHTA services. To this end, we **facilitated:**

- a. **Twenty-one interviews with RHTA jurisdiction representatives who received RHTA Program TA.** We created the potential interviewee list from the list of webinar attendees, and balanced representation from different all nine Bay Area counties.
 - b. **Three focus groups or interviews with 8 representatives from the RHTA Program and ABAG/MTC.** Participants included a selection of team members who designed or implemented various RHTA program components (content and administrative components) and agency leadership.
 - c. **Two focus groups with Community Planning Collaborative Leads.** Participants included attendees of a regularly scheduled Collaborative Lead meeting.
4. **Survey:** We asked individuals who used the RHTA Program's TA (e.g., participated in County Planning Collaboratives, used templates or guides, attended webinars) to complete a survey about their experience with the RHTA program. We gathered limited demographic information via the survey, such as the type of agency and geographic location, to allow us to cut the data during analysis and look for patterns in use and feedback. The survey yielded 72 responses. County Planning Collaborative leads and ABAG/MTC County Coordinators circulated the survey to the jurisdictions they lead and manage via email and in meetings.
 5. **Website and webinar data:** We analyzed data on RHTA webpage visits and webinar registration and views to understand trends and reach of the web-based resources. All RHTA webpages are hosted on ABAG/MTC's main website. ABAG/MTC provided a list of the 50 most-visited web pages on the ABAG/MTC website and culled the list for RHTA-related webpages. For webinar registration and view data, RHTA Program staff de-identified and aggregated registration information to produce a de-identified database of unique webinar registrants. The database included data about the specific webinars each person registered to attend, registrants' geographic location, and registrants' general role (e.g., ABAG/MTC jurisdiction, outside ABAG/MTC jurisdiction, consultant, non-profit). ABAG/MTC also provided counts of post-webinar views via YouTube and Box.

All interviews and focus groups were audio recorded, transcribed, and thematically analyzed using Dedoose. All survey data and other quantitative data were analyzed using Excel and R.



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